

MISSION**POSSIBLE**

TRAINING TECHNICAL STAFF TO MAXIMIZE CLIENT RELATIONSHIPS

SELF STARTER TOOL KIT

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MAXIMIZE **FACE TIME**



OH YEAH,
MY CLIENT IS FINE. JUST FIIIIINE.
I CHECKED IN WITH HIM
FIVE MONTHS AGO!

BIGGEST SALES NEED **QUALITY FACE TIME**

-  Right Clients
-  Manage Time & Message
-  Unique Value Propositions
-  Test, Buy-in, Advocacy

HOW DO YOU **MAXIMIZE FACE TIME?**

- Call Planning
- Active Listening (LAER)
- Break Down Barriers
- Deliver Value in Every Interaction

CALL PLANS **ADDING VALUE BY DESIGN**

- **PLANNING** – What do you know? What does the client know?
- **KEY ISSUES FINDING** – What key issues exist? How do you solve those key issues?
- **VALUE DELIVERY** – What are you bringing? Who? How?
- **COMMITMENT** – What's the next step? Who? How? When?

Activity:
CALL PLANNING EXERCISE

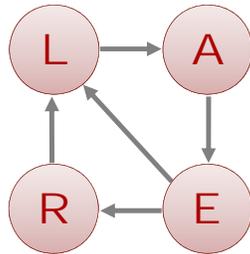
GROUPS OF THREE
CASE STUDY
CALL PLANNING FUN SHEET
CALL PLANNING ACTIVITY

LISTENING IS THE KEY



LAER

- Listen
- Acknowledge
- Explore
- Respond



LAER LISTENING

BEFORE THE EVENT

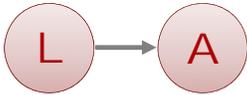
- Start with their perspective
- Don't judge



DURING THE EVENT

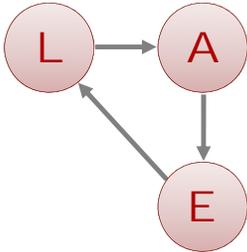
- Think about their perspective
- Eye contact
- Be patient
- Respect pauses

LAER **ACKNOWLEDGING**



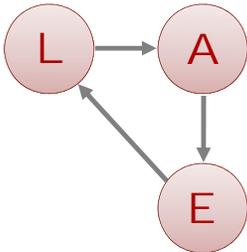
- Reflect
- Support
- Validate
- Develop rapport
- “Of course” or “That makes sense”

LAER **EXPLORING**



- Understand and discover underlying objectives
- Make a sincere effort to understand
- Be involved
- Seek to understand complexity of problem
- Avoid jumping to a response

LAER **EXPLORE QUESTIONS**



- “Why do you say that?”
- “Let’s make sure I understand...”
- “Is that a common problem?”
- “I’m not sure I get that...”
- “Can you please build on that?”

LAER LOOP

▪ Stay in this loop long enough to fully understand and develop an appropriate response

The diagram shows three red circles labeled L, A, and E. Solid arrows connect L to A, A to E, and E to L. A dashed red arrow also connects L to E, completing the loop.

LAER RESPONDING

▪ Recommend
▪ Provide alternatives
▪ Suggest solutions
▪ Deliver value
▪ Advance to the "Next Step"

The diagram shows four red circles labeled L, A, E, and R. Solid arrows connect L to A, A to E, E to R, and R to L.

Activity:
LAER ROLE-PLAYING

GROUPS OF THREE
CASE STUDY

EVALUATE SUCCESS

- How much of the time did the client talk? Did you identify any of the client's challenges, issues, hopes, or expectations?
- Did you talk about them... or... us?
- Did you discuss topics that would make the client business/ agency better?
- Did the client have any "aha" moments?
- Did the client ask for "more" or suggest changes?
- Are we learning enough to tailor our value proposition?
- Did the client commit to a next action?

AVOID INEFFECTIVE BEHAVIOR

- Conversations focused on the client's history, past projects, and things the client already knows
- Rapid-fire questions and mining for information rather than offering information
- Focusing the conversation on the client's readily apparent (and often explicitly known) needs
- Asking the client to repeat information they have previously provided
- Making poorly informed assumptions about client challenges

EFFECTIVE BEHAVIOR

- Demonstrate insight to a client's current challenge or business need
- Share newsworthy insights about the market, educating the client on new issues, and helping them avoid potential problems
- Provide a unique perspective during the conversation
- Tie our insights back to our unique strengths after dissatisfaction with status quo is achieved
- Identify previously overlooked or unrecognized problems or opportunities

THE **CLIENT'S** PERSPECTIVE

- “I have something this person wants and I have no intention of giving it to him.”
- “I have to give her the same information I would give her competitors (if she asks the right questions).”
- “I hope this doesn’t take too long so I can get back to my real job.”
- “This person will spend his time trying to sell me something I don’t need.”

BARRIER BREAKERS

- Personal style and genuineness as a prerequisite
- “As an owner, what do you wish we’d do for you?”
- “What are your issues?”
- “What do you wish you’d get?”

WHAT IS **VALUE DELIVERY**?

- Two types
 - more general value delivery - personal or business-related
 - response to client needs not being met
- May be hard or soft value
- When you deliver value where no one else can, you have a competitive advantage

Resource:
VALUE DELIVERY TOOLS

MAKING IT A **HABIT**

- Being There (face time)
- Timing
- Customer Relationship Management
- Persistence
- Reward good behaviors

Resource:
SELF STARTER TOOL KIT

www.marketerstakeflight.com/missionpossible

FUN**S**HEETS

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INFRASTRUCTURE FOCUSED CASE STUDY

Background about the Project

The Happiest Place on Earth Department of Transportation (HPE-DOT) has plans for a new highway with interchanges, right-of-way for freight rail that connects to a new airport in Moore Haven, Florida just a couple of hours south of your Orlando office. They have just held an industry forum describing the project, schedule, contracting method and budget. The construction value is budgeted at \$100 million. The primary objective of the project is to increase the capacity of both passenger and freight traffic through this corridor. HPE-DOT would like to have this project constructed and completed before the Panama Canal expansion is opened. HPE-DOT has not yet decided the contracting method (design-bid-build, design-build, or design-build-finance) for this project. The firm who did the environmental/PD&E study has gone bankrupt and no longer in business. Although the project has received support from the municipalities affected, HPE-DOT also faces a small but vocal citizen group that has expressed distrust and opposition regarding how the land for this project was acquired (eminent domain).

Background about Mouse Ears Engineering firm

Mouse Ears Engineering (MEE) has more than 150 staff located in the Southeast United States. Founded in 1971 by Walt Disney, MEE is a leading provider of engineering, construction and technical services for public agencies and private sector companies. MEE offers a full range of roadway and highway design; signalization; signing and pavement marking; structural engineering; drainage design; construction and construction management; and operations and maintenance. Most of MEE's recent success has been in Georgia, South Carolina and Alabama. While there is a strong presence in Florida, the most recent major project has been done outside of Florida. The firm recently won three awards for its design and construction of the S.S. Goofy Highway located outside Atlanta, Georgia. The same project manager is proposed for the new highway project for HPE-DOT.

Over the past six months, your marketing department has developed an informational campaign targeted to Southeast regional DOTs to strengthen MEE's brand awareness and technical capabilities specifically related to complex highway design and your award winning projects. It's gotten positive feedback from clients and prospects. MEE has also launched a new website featuring regular articles from your principals: Walt Disney, Mickey Mouse, Cindy Rella, and Buzz L. Year.

Scenario

Mr. Nemo Fishman is MEE's president and majority equity owner. Mr. Sellerman is MEE's number one business development manager. Ms. Tinker Belle leads MEE's marketing team. MEE has been shortlisted and requested to make presentations for the new highway opportunity.

Over time, Mr. Sellerman has built an effective working relationship with several of the selection committee members who are responsible for evaluating initial qualifications submittals. Mr. Sellerman has just concluded a number of one-on-one meetings with several of the selection committee members. He has also secured exclusive teaming partners.

Here is what he has learned:

- HPE-DOT likes your qualifications, but several members of the team think your PM is weak. The only clue you have to the nature of the perceived weakness is that this PM is from Georgia, hasn't worked in Florida for some time, and therefore knows little about HPE-DOT preferences. They are also concerned that he may not be able to deliver the right level of quality design. The fact is that he is the best PM that MEE has available.
- Your main competitor is Road Runner LLC. Its qualifications package was not as strong as yours but they have been working on numerous projects with HPE-DOT for some time. As a result, some members of the evaluation team are loyal to Road Runner's people. They feel Road Runner should get the work.
- There is some concern that the roadway design needs to make a statement about the concern HPE-DOT has for the people and community, but there is no desire to go out and bring on a signature architect/designer.

- Sellerman has chosen excellent teaming partners, including the services of a real estate consulting firm that specializes in helping win battles regarding right of acquisition disputes (a potential problem that HPE-DOT knows it will need to address).

Call Planning Assignment

Work through the call planning fun sheet to prepare to meet with several selection committee members to introduce your proposed project manager.

LAER Active Listening Assignment

This is a role-playing assignment in which each team member will be designated as the sales person, client or observer. The observer will watch and track whether the sales person follows the LAER process.

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VERTICAL CASE STUDY

Background about the Project

The University of Golden Knights (UGK) is rumored to have begun fundraising for a new Medical Education Building that will house its College of Medicine faculty and students on its newly established campus in Templar, Florida, just a few hours south of your Orlando office. The Templar Business Journal (TBJ) recently published an article announcing that UGK recently received a substantial donation in the amount of \$20 million. UGK's Capital Improvement Plan lists the project as the University's number one priority project, with an estimated project cost of \$45 million and size of approximately 95,000 GSF.

The primary objective of this project is to provide current and innovative teaching laboratories and support facilities which respond to the latest trends toward small group learning, the use of simulators and standardized patients for professional development and assessment, state of the art information technology, and access to information in a wireless environment. UGK plans for this project to be designed and built in time for the Spring 2015 semester. While UGK hasn't released an RFQ for the project, the CIP indicates this project will most likely go design/build. Although UGK faculty and students bleed black and gold, the University is committed to "going green" and is currently evaluating options such as LEED, Green Globes, Net Zero and the Living Building Challenge.

Background on The Renaissance Group (TRG)

The Renaissance Group (TRG) has more than 1800 employees located across the world. Founded in 1955, TRG is a leading provider of architecture, planning and design services for clients in the Higher Education, Science + Technology and Healthcare markets. TRG's recent success in the Southeast has been primarily on projects located in Florida, Georgia and Alabama. While TRG has a strong presence in Florida, its most recent project of similar size/complexity was completed in Alabama, at the University of Crimson Elephants' (UCE) new Medical Education Commons.

Over the past six months, your marketing department has developed and launched an email marketing campaign targeted to regional higher education institutions to strengthen awareness about TRG's brand, thought leadership and technical capabilities specifically related to medical education facilities. Your marketing team has also just completed a client research initiative that indicated that a slight majority of University Clients are pleased with the experience that they've had working with TRG in the past. This research included feedback from UGK (which was surveyed on their experience working with TRG on a recent Biomedical Research Pavilion project), and UCE (for the new Medical Education Commons project). Both indicated that TRG's project management is indistinguishable from other AEC firms, and that it's not particularly well known for its "green" work.

Scenario

The managing principal for TRG's Southeast Operations is Mr. Aye Needwork. Ms. Ura Winner and Ms. Ima Starr run the Business Development and Marketing Department for the southeast. Both Mr. Needwork and Ms. Winner have known the Dean of the College of Medicine for some time and worked with her on their previous Biomedical Research Pavilion project. They have a meeting in two weeks with the Dean and her staff in which they will have an opportunity to further discuss the upcoming projects. At a meeting with the Operations Director for the UGK College of Medicine a few weeks back, Mr. Needwork and Ms. Winner learned a few things about the potential project.

Here is what they have learned:

- UGK enjoyed working with TRG on the BRP project but have some unresolved issues with water intrusion issues that the contractor claims are design issues.
- UGK does not have the full amount of funds required for the project and does not expect the state to provide funding for the remaining amount needed.
- UGK has begun doing some preliminary programming for the project and produced some renderings that are currently being used for fundraising.
- The proposed site for the project has a creek running through the east side and a few grand oaks that the University hopes to maintain.

Call Planning Assignment

Work through the call planning fun sheet to prepare to meet with the Dean and staff.

LAER Active Listening Assignment

This is a role-playing assignment in which each team member will be designated as the sales person, client or observer. The observer will watch and track whether the sales person follows the LAER process.

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CALL PLANNING FUN SHEET

Sales Lead: _____ Client: _____ Company: _____
Call Date: _____ Location: _____ Participants: _____

PLANNING

What do we know about this client?

What does this client know about us?

What are the client's objectives for this meeting?

What are our objectives for this meeting?

KEY ISSUES FINDING

What Key Issues have you already identified? Why are these Key Issues?

What Key Issue-finding questions will you ask?

CALL PLANNING FUN SHEET

VALUE DELIVERY

Engage: List rapport-building topics

RESPONSE CHECK

CONFIRM OBJECTIVES: List concise objectives for this call (from above)

DELIVER VALUE: What value do you bring your client on this call?

SUMMARIZE BENEFITS: List benefits client will receive from us

COMMIT: What next step do you want the client to commit to?

COMMIT: What next step will you commit to?

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LAER ROLE-PLAYING ACTIVITY – OBSERVER NOTES

As the Observer, you are looking to reinforce the LAER loop. Take note on the following:

How many times did the salesperson stay in the “explore” loop before responding?

How well did the response address the issue/concern?

Did the salesperson get commitment for the next action/step?

Rate the listening skills.

Other observations.

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VALUE DELIVERY TOOLS FUN SHEET

What is Value Delivery?

There are two types:

- 1) more general value delivery (personal or business-related)
- 2) value delivery that responds to specific client issues

When you can deliver value where no one else can, you have a competitive advantage.

Examples of Value Delivery Tools

- Executive Summaries
- Presentations and discussion sessions
- White papers and articles
- Client histories with milestones (timelines)
- Technical and/or training seminars
- Legislation briefing and advocacy
- Project videos
- Site visits
- Interactive planning sessions
- Co-sponsor a presentation at a conference

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