Market-Office Business Development Plan

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# By Lindsay Diven, CPSM

Lindsay Diven, CPSM manages the Marketers Take Flight blog, which focuses on helping marketers new to the engineering, architecture, and construction (AEC) industry acclimate. She shares her lessons learned and processes with readers so they can become successful in their AEC marketing careers.

She went from a marketing coordinator new to the industry to a Marketing and Business Development Director responsible for managing a nearly $70 million sales goal and team of 12, during the recession. Now an award-winning marketer, she believes that helping new marketers acclimate specifically to this industry helps the entire industry.

She graduated with a Bachelor of Science in Marketing and lives in Orlando, Florida with her husband and two children. Outside of work she is an avid college football and baseball fan.

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*Should be completed last. Summarizes the other sections of your plan. Helps the executive team and implementing team members quickly understand and support the plan.*

1. Market/Office Overview and Future Trends
	1. Market/Office Overview

*This includes a summary of research conducted by your team about your market and its’ clients. This doesn’t have to be a comprehensive report on everything going on in the entire market. However, you should conduct an analysis to ensure the market is growing, able to serve your firm’s criteria for growth and cross-marketing.*

* 1. SWOT Analysis
		+ SWOT Definition
			- *Strengths are competitive advantages or core competencies that give the organization an advantage.*
			- *Weaknesses are limitations a firm has in developing or implementing a marketing strategy.*
			- *Opportunities are favorable conditions in the market place that could yield rewards for your firm, if acted on properly.*
			- *Threats are conditions or barriers that may prevent the firm from reaching its goals.*
		+ *SWOT in Action*
			- *During the development of the BD Plan, marketers attempt to match internal Strengths to external Opportunities. In addition, they try to convert internal Weaknesses into Strengths and external Threats into Opportunities.*
	2. Current Clients
		1. *This should be a list of current clients and historical sales volume for each. This will help give you a sense of priority of clients.*
		2. *Also assign a client champion and list each in this section.*
	3. Future/Targeted Clients
		1. *This assesses and lists current needs of each of the firm’s target markets/clients, anticipated changes in those needs, and how well the organization’s current services and expertise can meet those needs. It also can expose any gaps in current services and expertise that may be needed in the future.*
	4. Strategic Partners
		1. *These are subconsultants, contractors, designers, etc. that you team with to win work. These can be current partners or targeted partners.*
		2. *List them out and assign a partner champion to each. The idea is treat similar as clients.*
	5. Competitors

*Similarly to your market overview, your competitive analysis doesn’t have to be a thorough report listing every detail about every competitor. Rather, in addition to defining who your key competitors are, you should list their strengths and weaknesses.*

*Most importantly, use this analysis to determine our current competitive advantages and ways to develop additional advantages.*

1. Sales Overview

*This is the section for your financial projections.*

* 1. Sales Performance and Trends
		1. *List your sales/contracts for the last 3-5 years. Display in a bar chart format so you can see the trends. Differentiate by market and/or office based on your accounting set-up.*
	2. Short-Term Goals
		1. *These are the goals for the current year. This section should start with a narrative overview of the objectives (i.e. gain XX new clients, offer XXX new service, expand office by XX new employees, etc.). The next part is a table that documents all of your planned opportunities along with the pursuit manager, expected revenue, probability, weighted revenue, and estimated pursuit cost.*
		2. *This is the meat of your plan and the hardest.*
		3. *This is the table that sets the priority for the implementation plan. Every BD Meeting and Go/No-go decision is based off of this table. It sets the priority for business development team.*
	3. Long-Term Goals
		1. *These are the goals for the next 1-3 years. How will your office/market look like? What kind of new clients and/or project-types will you be pursuing?*
		2. *This is usually just narrative.*
	4. Budget
		1. *This is the budget set to achieve your plans. You can get as detailed as you would like. I suggest highlighting the following:*
			1. *Marketing - The cost of award submissions, professional photography, advertising, donations, special events, memberships, etc.*
			2. *Pursuits - Includes all effort to secure a pursuit including business development, technical, and marketing time and expenses.*
			3. *Conferences/Tradeshows – All time and expenses in preparing, attending and following-up.*
1. Marketing Activities/Mix

*The marketing mix section should provide considerable detail regarding various marketing and BD activities related to achieving the sales goal. These can include: Organizations, Conferences/Tradeshows, Published Articles, Social Media, Advertising, Awards, Special Events, Golf Tournaments, Donations, etc.*

*This section should detail each activity, who will be leading, the estimated budget, and desired outcome or goal.*

1. Implementation Plan

*This component of the BD plan outlines the specific activities required to implement the BD Plan, who is responsible for performing these activities, and when these activities should be accomplished based on a specified schedule.*

*This section should also outline the team who will be responsible for developing, implementing, monitoring/reporting, and making corrections (as needed).*

1. Evaluation

*This section details how the results of the BD Plan will be measured and evaluated. It can specify the types of reports (pipeline, sales, hit rate, etc.) and frequency of reports (weekly, monthly, quarterly, etc.).*

# Conclusion

This isn’t all the material I have to develop systems to get more work done. If you have found this information useful, then I encourage you to visit the **Market-*ers* Place** on the Marketers Take Flight website for other helpful information such as other Self-Starter Kits, Mini-Workshops, and Premier Courses+Coaching. The ultimate goal is to help you not only acclimate to the marketing department, but get promoted faster. Join me at: www.marketerstakeflight.com.