HOW TO BUILD TRUST AND WIN HIGH-REVENUE PROJECTS

eBook by COSENTIAL®

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Leading architecture, engineering and construction (AEC) firms develop strong, mutually beneficial relationships. Every dollar they earn is a symbol of the trust they've built with clients.

What's their secret? Effective communication.

While many firms struggle to promote their unique advantages, high-performing firms leverage their experience to paint a vivid picture of how they can help owners achieve their goals. And instead of relying solely on existing relationships to win projects, they proactively form new relationships that drive revenue growth.

In this eBook, we share tips, tricks and best practices to help firms improve their communication strategy and develop lasting relationships that lead to high-revenue projects.

CREATE A CONSISTENT FOLLOW-UP SYSTEM

It's easy for client and prospect communications to slip through the cracks. We're all busy.

And while email has made it easier to communicate across large distances, many people deal with unruly inboxes that are difficult to manage. In fact, research suggests the average business person will send and receive 126 emails every day by the end of 2019.

That's a lot to keep up with.

Making matters worse, firms often rely on the seller-doer model, where technical staff are also responsible for business development (BD). Juggling their primary responsibilities alongside BD certainly makes it more likely they're forgetting or missing out on promising follow-up opportunities.

Fortunately, there are strategies business developers can employ to prevent important revenue-building opportunities from passing them by. Craig Jarrow, time management trainer and author, recommends following 10 steps to keep up with important tasks:

1. Set an alarm.
2. Put it on your calendar.
3. Write it down.
4. Set a reminder.
5. Do it now, so you don't have to remember later.
6. Have someone else remind you.
7. Put it on automatic.
8. Don't say yes in the first place.
9. Have someone else do it.
10. Use your list.

More than half of these suggestions come down to creating documentation and setting reminders.

Stephanie Fortner, implementation specialist at Cosential and former AEC business developer and marketer with 25 years' experience, agrees that documenting crucial information — including conversations about leads, rumors, opportunities and pursuits — and setting reminders are key.

"If you reach out to somebody and they say, 'Maybe check back in six months,' you'll want to set a reminder to follow up," she explained. "And you'll want to make sure you can look up what you talked about."

Capturing this knowledge and using it later allows firms to demonstrate that they listen better than their competition, elevating them to a level few achieve. Owners know firms are on their best behavior before signing a contract, so it's crucial to make a positive impression early.

Maintaining consistent contact with clients and prospects even when a new project isn't on the table can go a long way toward establishing a meaningful relationship.

"Everybody can respond to a request for proposal [RFP] or request for qualifications [RFQ], but what have you done to position yourself with the client ahead of time?" Stephanie asked. "You want to be proactive, rather than reactive, because nine times out of 10, what's going to set you apart is the relationship."

Revenue Path Group Managing Principal of AEC Jeff Echols draws from over two decades in AEC marketing and business development to add that "creating deep connections and understanding the pains, threats and fears that drive the RFP or RFQ allow a firm to communicate with the selection committee in a way that resonates with the way their brains develop trust and make buying decisions."

COORDINATE YOUR COMMUNICATION

Consistently following up with leads and rumors is a firmwide responsibility, especially for firms that have a mix of dedicated business developers and seller-doers — a growing trend in AEC.

SMPS reports that in 57 percent of firms, 75 percent of technical staff have BD responsibilities. Most often, "business developers [are] described as openers (as in they open doors for technical staff) and seller-doers [are] described as closers (as in once the door is open, they go in and close the sale)."

The hand-off period is key. Clients expect a consistent experience, and firms that fail to deliver — by repeating the same questions, misunderstanding goals and not following up on the previous business developer's promises — will likely lose the project ... and may even damage a longstanding, positive relationship.

According to Training Industry, inconsistent messaging between various business developers "creates a sense of concern regarding the supplier's ability to set realistic expectations, execute and deliver results."

That's certainly not the way to build trust, create beneficial relationships and win profitable projects.

"Design and construction projects require the finest orchestration of moving parts," said Client Savvy Chief Experience Officer Ryan Suydam. "If the sales process sounds like a fifth-grade classroom haphazardly playing random instruments, the client will never trust you to pull off a flawless symphony later."

To deliver a consistent, cohesive experience, firms must provide a way for all business developers and seller-doers to understand the full history of their firm's interactions with the client. This includes:

1. Who the client is.
2. Who works for the client.
3. What projects the firm has done with the client in the past.
4. Who within the firm last spoke with the client.
5. Who they spoke to.
6. What was said.

Armed with easy access to this information in one central location, business developers and seller-doers can deliver consistent messaging that resonates with the client and ultimately leads to new projects.

CREATE STANDOUT MARKETING CONTENT

Firms' past experiences are what proves they're capable of handling new projects, and it's critical to promote that experience at every opportunity.

Unfortunately, many marketing teams struggle to quickly access the project data needed to create content that drives new projects — which is particularly problematic when creating bids and proposals.

"You have RFPs that ask you to show a list of 100 projects you've done within X miles of a specific location, and they want to see the project names, the client names and the project addresses," said **Monica Moore, implementation specialist** at Cosential and former AEC business developer, marketer and technology specialist with 12 years' experience. "A marketing team sees that request and thinks, 'Oh, no. I have to make this giant document, it has to be beautiful and represent us as a firm, and I have to somehow find all the projects that meet that requirement and know all these facts about them.'"

To find this information, marketers often turn to technical staff to gather and verify project data … with inconsistent results.

"Often, they'll tell the marketer, 'I didn't know you asked for that because I was on site,' or 'I gave you that information last month, can't you just pull it from last time?'" said **Jan Flesher, director of client advocacy** at Cosential and former AEC marketer of 30 years. "But usually, the marketers are understaffed and overworked, and they are screaming from one proposal to the next. If they've gotten the information they're asking for before, they probably don't even remember where they put it."

Monica agreed.

"It's just this huge headache," she explained. "It takes forever to find the data, and then they have to go in Word or InDesign and manually set up, design and write all of this by hand — and maybe copy and paste some information from an old proposal. It's all very time-consuming and tedious, and they're up against a deadline."

By storing, organizing and providing marketers with access to project data, firms can empower them to quickly create proposals that drive revenue growth.

"Having access to that data and being able to quickly answer those basic questions is really big," Stephanie said. "You can start getting more in-depth and providing more value with your proposals instead of just getting the bare minimum out the door."

And creating high-value proposals is critical, as client expectations are shifting. According to PSMJ:

In the past and even today, for most in the A/E/C community the word "proposal" conjures an image of a long, boring written document that is pure drudgery to put together and even worse to read. In recent years, we have seen a transition to shorter, more attractive proposals, with reasonably sophisticated use of graphics and whitespace. The world of proposals is in transition again. We're seeing purely electronic submittal of proposals, which opens the door to embedded hyperlinks leading to more and more interesting information, including more graphics and videos.

That shift toward electronic proposals with hyperlinks and visual content also requires extensive content creation outside the proposal. And creating these assets within the context of an overall content production strategy is key.

While in previous years it was acceptable to ignore common marketing tactics — like content marketing, search engine optimization (SEO), digital advertisements, and more — they are becoming increasingly important to attract new prospects and remain competitive.

According to SMPS, "Marketing tactics have evolved drastically over the past 10 years and will continue to evolve at a rapid pace. For years now, traditional outbound methods such as trade shows, print ads, direct mail, and cold calling have not produced the same results. It's become increasingly difficult for A/E/C marketers to break through the noise and generate leads."

The article went on to suggest using the following tactics to stand out in today's competitive environment:

- Social media
- SEO
- Paid search
- Content creation

But using these tactics isn't enough on its own. Marketers must promote their firm's unique personality and strengths in everything they do.

"The biggest danger for AEC firms is to look the same, sound the same and act the same as everyone else in the industry," said Jeff of Revenue Path Group. "It's the first step toward becoming commoditized and irrelevant."

DELIVER TARGETED PRESENTATIONS

During the interview stage, it's important to deliver a targeted presentation that resonates with your audience. According to Construction Executive, "This round is about proving a company's team and the company they wish to work for are going to have a smooth working relationship on the project. So, spending time carefully constructing the presentation for the project is of the utmost importance."

For firms who wish to deliver project-winning presentations, research is key.

"I think the biggest thing is doing your homework. You need to know your client and their hot-button issues," Stephanie said. "You have to know whether their biggest concern is price, performance or something entirely different."

To understand your client's biggest concerns, first review the RFP. This document will highlight topics they are most interested in covering.

Next, review previous communications — such as phone calls and emails — to determine where clients had additional questions and concerns. This will provide additional context around the challenges they wish to overcome and solutions they hope to find.

Finally, make sure to understand who is in the selection committee. Most likely, there will be a panel of multiple stakeholders who each have their own interests and concerns. For every individual present, try to include at least one point that will address their priorities.

PSMJ put it simply: "Look at BD from the client's perspective, not from the firm's perspective of 'what you have to offer.'"

Jeff agreed.

"The most difficult question in business development is: 'Why should I choose you?'" he said. "Don't make the mistake of thinking that the answer to that question is about you — your experience, your qualifications. None of this is about you. It's about them. They need to know what's in it for them."

ENSURE EMPLOYEE TURNOVER DOESN'T HINDER THE CLIENT EXPERIENCE

When firms don't have a plan to address the loss of institutional knowledge, employee turnover can put key relationships at risk. Sally Orcutt, marketing director at Client Savvy, shared the following anecdote:

"One of our Rainmakers is retiring next year, and we just know that we will lose a large chunk of our work because of it." — Principle at mid-sized architectural firm

A major concern for most firms is that if a key staff member leaves, the work they've managed goes with them. After all, it is not the building, the drawings, or the assurance documents you submit, but the client experience that is your firm's product. Those team members who go above and beyond to build these relationships with clients are incredibly valuable. However, without a proactive approach to building trust in your business firmwide, any clients accustomed to working with these key staff members are at risk of leaving.

An effective strategy to neutralize this risk is to develop deep client relationships within your organizations. Let your strategy capitalize on the communication and relationship skills of your key staff, but also continually give others on the team the chance to practice and nurture their communication skills and build their own bridge of trust with the client."

Staff will struggle to achieve the goal of deepening relationships if they don't have a clear history of knowledge about each client. To empower their success — and mitigate the effects of employee turnover — commit to documenting relationship information in a shared repository so the entire team can put it to use.

HOW WE CAN HELP

Cosential's AEC-centric Client Relationship Management (CRM) and Proposal Automation solution makes it easy to:

- Document crucial conversations about leads, rumors, opportunities and pursuits.
- View your firm's entire communication history with clients.
- Easily store, organize and find project data.

"Using Cosential is almost like having another team member," said **Travis Wilson, director of marketing** at Layton Construction. "We're finding the information we need much quicker. We just search in Cosential, and it's there. It saves considerable time by putting often-needed information at our team's fingertips."

Request a demonstration to learn how Cosential can help your firm build trust and win profitable projects.

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WE'RE RATED at Software Advice

"Cosential made the jump in 2017 to the most popular client relationship management software, surpassing previous industry favorite Salesforce by 7%."

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