

SMALL FIRM MARKETING PLANNING IN A DOWN ECONOMY

In today's small A/E firm, marketing has become more of an administrative task rather than a strategic initiative.

The core document of the marketing management initiative is the marketing plan. Most large companies have one to describe to the stakeholders the direction for the next fiscal year. For smaller companies in the A/E world, which we will describe as under 250 employees, one is never created.

The document is viewed as more administrative than a strategic planning tool. The overall purpose of the marketing plan is organizational direction. Many plans provide only goals or a vision on where one would like to be in three to five years. However, long-term goals are always put aside to deal with short-term crises.

Marketing plans should not only provide a vision but a course on how to get to that destination. Plans that don't include steps on how to reach those goals often lead to document abandonment. Action items must be written down within the plan on how to achieve that objective.

There truly is no universal format for a marketing plan, but it should encompass the following properties.

1. Describe the background and history of the firm.

This is important to give a history of the firm as a basis for future reference for new employees. Since personnel are constantly changing, a background section can provide a tangible resource to new employees wanting to know more about the firm. In addition, it allows you to tie your organization goals to your organizational culture.

2. Qualitative interviews with employees. In order to achieve buy-in at both the management and employee level, interviews should be conducted with all your staff. Ideally, all employees should be interviewed but dependent on your firm's size, department heads and key decision-makers will do. Questions should be open-ended and long term goal-oriented in nature to allow employees to have a share in the planning process. Look for patterns among employees of similar concerns. This will provide direction for goals within the plan. When the plan is written, the firm will have greater buy-in due to being able to contribute to the process.

3. Quantitative Survey. A quantitative survey should always follow your interviews. Data is power in today's business environment. In order to back up your goals for the marketing plan, some quantitative data must be collected. This will be used for two purposes. The first is to provide solid numerical evidence of what employees want in the plan. Second, on many occasions, it may provide inconsistencies or insights into the goal-making process which were not revealed in the qualitative portion of the planning process.

4. Analysis. Both the qualitative and quantitative data should be reviewed and analyzed for common themes and goals. Long-term goals should be crafted from the analysis. In addition, your data should be calculated and inserted into your plan. This will provide credibility and validate the goals your firm is wishing to pursue. Without concrete evidence, your plan will be no more than merely a collection of opinions interpreted by you and subject to management scrutiny.

5. Goals and action plans. In writing the initial report, be sure to start with each goal, followed by the appropriate action steps to achieve that goal. Each goal and action step should encompass the following:

- Goals or long-term outcome should be listed first followed by corresponding action plan.
- Action steps must include: Person responsible, action step or task, due date, cost, and completed checkmark field.

In this step, it is important to work with your firm's CFO or equivalent to help with your cost to achieve the marketing plan. This will also ensure the funding is appropriate for your goals. By working with the financial team, you have a greater likelihood of getting all the plan's goals approved before the plan's submittal to senior management. After each task is completed, it should be checked off to ensure accountability and track progress.

6. Final Thoughts. After all of the outlined steps have been taken, a conclusion page should be inserted. This should include the main takeaways from the plan along with any final thoughts of the author of the plan. This is also a good opportunity to voice any special concerns you may have run across.

Small Firm Marketing Planning in a Down Economy (cont.)

Marketing plans should always be considered a living document. They should be something that are worked on constantly to ensure the firm is moving in a consistent organizational direction. By hard-wiring in accountability through task completion into the document, it maintains the document's relevance. The steps provided above ensure that the firm is moving toward its goals with employee buy-in.

Without employee buy in, along with quantitative data to back up your findings, a marketing plan will be no more than a multipage direct-mailer doomed to the trash.

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MARKETING TECHNIQUES TO PENETRATE NEW MARKET SECTORS

by Sara Gammill

Breaking into a new market is one of a marketing department's biggest challenges. But in a down economy when your existing clients may be tapped out in terms of projects for your firm, it can be very tempting for firm leaders to want to pursue new clients in new markets. After all the research, number crunching, and forecasting, it comes down to leveraging your firm's accomplishments (whether large or small) and broadcasting your success creatively.

The first eight years of my AEC career were spent in the regional office of an established global design firm known for interior design, architecture, and planning for professional service, high-tech, and corporate companies. During my tenure, we began flirting with the education and hospitality industries.

For our first forays into these new markets, we only pursued projects with a pre-existing client relationship (or if the submittal process wasn't too painful). We began to see that we were making gradual headway and building name recognition. Between proposals, we met with client leadership and worked to build consultant teams with specific project experience in these new markets. Then, one opportunity from each industry fell into our laps that we could not pass up.

I've learned many lessons through my experience teaming, proposing, presenting, and marketing those first significant education and hospitality projects. But these lessons apply generally, and may help you as you venture into markets new to your firm.

Strategies

1. Team with another firm. Partnering with another firm is one of the easiest and most common ways to

supplement a firm's experience and technical team. In many cases, one firm may have the right experience, but not the manpower to produce documentation. One firm may have similar projects in its portfolio, but not the right client relationships to make the deal happen.

When teaming with another firm, there are a few things to consider as you put your proposal plan together:

- Decide how the team will be structured. This is a meeting that should take place between senior level marketers and/or principals. If this is more than an informal partnership, discussions on team structure, liability, and other legal and financial issues must be ironed out before the proposal is written.
- Remember that each firm has its own marketing strengths. The team members producing the proposal should also have a meeting. The group who has experience producing responses to similar RFPs should take the lead. Organization in the marketing departments and communication between all parties owing the marketing departments information are critical issues when two or more firms team. Production deadlines for the marketing groups as well as deadlines for receiving information from technical team members must be set early and respected.
- Illustrate your team structure in the proposal. If one of the firms is the prime firm, that firm should be positioned as such throughout the proposal in narratives, such as executive overview and approach sections, and graphic illustrations like the organizational and workflow charts. The same is true if the team includes two or more firms in an equal partnership. Perhaps the cover letter is signed by all firms'

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