Marketing Anxiety: Bragging with Aplomb

APA 2017 Webcast
Friday, October 13, 2017
1:00pm to 2:30pm
Marketing: Is it...

- Event-based ➔ Continuous?
- Client / Project Specific?
- Cost Implications?
- Shifting trends ➔ Keeping Up!
Panelists

- **Gwen Wright**: Planning Director, *Montgomery County, Maryland*
- **Daniel Berler**: Transportation Business Lead for Battelle; *Washington, DC*
- **Anne McBride, FAICP**: Co-Founder/Principal of McBride Dale Clarion; *Cincinnati, OH*
- **Michael Altman**: Co-Founder/Principal of Trialogue Studio; *Washington, DC*
- **Deana Rhodeside, PhD**: Co-Founder/President of Rhodeside & Harwell; *Alexandria, VA*
Session Sponsored by:

[APA Private Practice Logo]
APA’s Private Practice Division... dedicated to meeting the needs of private planning consultants through networking opportunities, business resources, and technical support.
Private Planning Practice Handbook

- APA Private Practice Division has recently updated its handbook offering insightful information to both novice and seasoned planning consultants.

- We are proud to offer this exciting publication to APA Private Practice Division members as a complimentary benefit.

- For membership information: https://www.planning.org/divisions/privatepractice/
Agenda

- 1:00 – 1:10  Introductions
- 1:10 – 1:25  Setting the Stage: The Client Challenge
- 1:25 – 2:00  Practitioner Perspectives
- 2:00 – 2:30  “What if?” Scenarios and Discussions
The Customer/Client’s Perspective on RFPs – What We Look For:

1. Know how the organization works
2. Demonstrate that you are “cutting edge” both in style and approach
3. Understand the project goals – and don’t rewrite them
4. Create a **STRONG** team with real roles for each team member
1. Know how the organization works

Know the basics – do your research:
Montgomery County Planning Department
1.1 million residents
$19.5 million approximate annual budget
$600,000 to $800,000 annual consulting budget

Know the (highly structured) procurement process:
• RFPs handled by central administrative office
• “On Call” consultants selected every 3-5 years through a RFP process
• Ability to “ride” other governmental contracts
• Ability to sole source a contract up to a specific dollar amount
Everyone wants to hang out with the cool kids

- Social Media trending: blogs, Twitter, LinkedIn
- Participate in conferences: speaking and organizing
- Publish articles
- Work on projects that are being discussed – and let people know you worked on these projects

The Commonwealth of Virginia was selected for an APA Gold Award for its UDA & Technical Assistance program! Renaissance... see more

Placemaker. Real Estate Developer keeping it real. Consultant helping #cities regenerate 'hoods. ULI Trustee. I hustle harder like a Detroiter. Bklyn Boy in DC.
3. Understand the project goals

- REALLY read the scope - including between the lines
- Innovate but don’t dominate
- Understand that customer has a good feel for local politics and other forces that will frame the project
- Be realistic and honest about what you can achieve within a certain timeframe
4. Create a STRONG team with real roles for each team member

- Select sub-contractors who have strengths and connections you may lack
- Make sure you have a real and well thought-out role for each sub-contractor
- Encourage sub-contractors to interact with the client – especially if they have pre-existing relationships
Looking forward to working with you!

- Email: gwen.wright@montgomeryplanning.org
- Follow me: @GwenLMWright
- Follow Planning: @montgomeryplans
- Facebook: facebook.com/montgomeryplanning
Marketing Anxiety
Bragging with Aplomb
Focusing on Priorities
Business Development Strategy

Why do a BD Strategy?

- Focuses your team’s attention
- Gets everyone on the same page
- Allows you to communicate among yourselves and with others

More importantly!

- Your livelihoods depend on it
- Growth provides expanded opportunities
  - Capabilities (personal and corporate)
  - Advancement
The Pipeline

Universe of Leads and Clients

Leads of Great Interest
Qualified leads

Submit Proposals

Wins

Sales

Revenue
(Profit / Headcount)

Goal: $1,200,000

Goal: $2,800,000
Win Rate: 50%

~ $8,400,000 ??

Goal: $1,400,000 ?

Goal: $1,200,000

Goal: $1,000,000

Goal: $1,400,000
The Relationship Ecosystem

Deep relationships fill the pipeline

Clients pick people they know (trust)

The more complex the job, the more intricate the relationships needed

The best BD strategy is to do good work.
Doing Good Work and Delivering

- Client service
- Client service
- Client service
- Relationships
- Relationships
- Relationships

- Comfort
- Confidence
- Dependence
- Information!!!
Customers and Services

- New Customers
- Existing Customers
- Existing Services
- New Services

New Customers x
Existing Customers
Existing Services
New Services
Capture and Pursuit Planning

- Map relationships – literally print out client’s org chart
- Gather small group of knowledgeable people
- ID who we know
- ID who we need to know
- ID what introductions we need to make
- Sketch out who, what, when and where?
- Visit customers – ID leads
- Develop lead-by-lead strategy – teaming, go/no-go, etc.

30 minute Conversation
Summary

• Our livelihoods depend on focused priorities
• A strategy allows everyone to row the boat in the same direction and in-time
• Relationships fill the pipeline
• Capture planning and execution is not hard
  ▪ But it has to get done!
• No heroics!
  ▪ Success cannot and does not rest on one person
  ▪ Steady, ongoing, methodical
Anne F. McBride, FAICP

- McBride Dale Clarion
- Founded in 1999

Firm Composition

- Public Sector Work
  - Comprehensive plans
  - Zoning codes

- Private Sector Entitlement Work
  - Zone map amendments/text amendments
  - Site investigation reports
  - Variances
  - Site plan approvals
  - Permitting

- Other Services
  - Staffing
  - Expert testimony
FIRM PRINCIPLES

• Public and Private
  – 50% private sector
  – 50% public sector

• National and Regional
  – 50% national work
  – 50% OKI work

• Maximum firm size:
  – 10+/- planners
WHERE DOES THE WORK COME FROM?

– Public Sector: Responding to RFQs, RFPs, sole source

– Private Sector: All referrals
  • Realtors, developers, engineers, communities

– Staffing Services: Long term relationships

– Expert Testimony: Proven track record with attorneys
MDC MARKETING PHILOSOPHY

• **Get out there!**
  – Professional Organizations:
    • APA/CREW/ICSC/OTA involvement
    • Active in organizations
  – Writing:
    • Chapter newsletters, planning magazine, PSA reports
    • Blogs/tweets
    • Write a book
  – Volunteer:
    • Universities
      – Teach/speak at classes
      – Mentor students
    • Train local boards/commissions
  – Community:
    • Participate in community planning efforts
    • Serve on community planning/zoning commissions/board of zoning appeals, etc.

SOURCES: https://media.glassdoor.com/sqll/140467/american-planning-association-squarelogo.png
https://planning-org-uploaded-media.s3.amazonaws.com/image/Chapter-OH-logo.jpg
https://pbs.twimg.com/profile_images/478527992600068096/-8EL6gf9_400x400.jpeg
http://miamioh.edu/cas/_files/images/poli-sci/cpmra-pics/OTALogo.jpg
BIGGEST MDC MARKETING TOOL
MICHAEL ALTMAN, TRIALOGUE STUDIO

Do good work and the clients will come

http://www.keyoung.hk/sites/all/themes/corporateplus/images/focus-on-quality.png
Four Basic Steps to Build a Brand

1. L ➔ R
2. R ➔ R
3. L ➔ L
4. L ➔ R
BRAND

were the best

Four Basic Steps
to Build a Brand

1. L  R
2. R
3. L
4. L  R

michael@trialoguestudio.com
BRAND

Four Basic Steps to Build a Brand

1. L R ——> R 2

3. L ——> L 4

la logo identity
product service

were the best...

awesome!

meh

wow

um?
BRAND
- logo
- identity
- product
- service

Five Basic Steps to Build a Brand
1. L R
2. R
3. L
4. R

brand = reputation
reputation = trust
trust = reliability + delight
**BRAND**

- logo
- identity
- product
- service

Brand = reputation

reputation = trust

trust = reliability + delight

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Four Basic Steps to Build a Brand

1. L R
2. R
3. L
4. R

Vision + values + personality = story
BRAND

1. Logo
2. Identity
3. Product
4. Service

were the best

Four Basic Steps to Build a Brand

1. 
2. 
3. 
4. 

brand = reputation
reputation = trust
trust = reliability + delight

vision + values + personality = story

aligned
believable
relevant
distinctive

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BRAND

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Four Basic Steps to Build a Brand

1. L R
2. R
3. L
4. R

- aligned
- believable
- relevant
- distinctive

vision + values + personality = story

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Four Basic Steps to Build a Brand

1. L → R
2. R → L
3. L → R
4. R → L

brand = reputation
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vision + values + personality = story

aligned
believable
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We are hardwired to notice only what's different!
Discussion
For more information and to join:

https://www.planning.org/divisions/privatepractice/