

# 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:



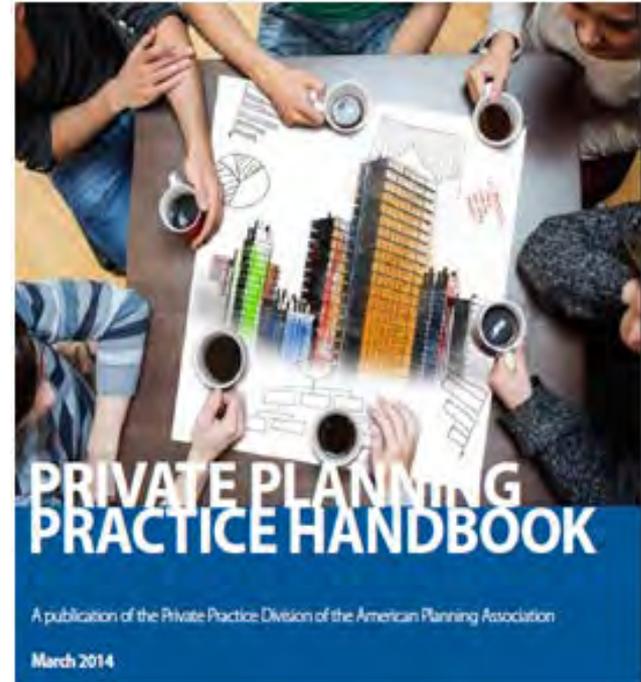
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APA's Private Practice Division...  
dedicated to meeting the needs  
of private planning consultants  
through networking opportunities,  
business resources, and technical  
support.

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# 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

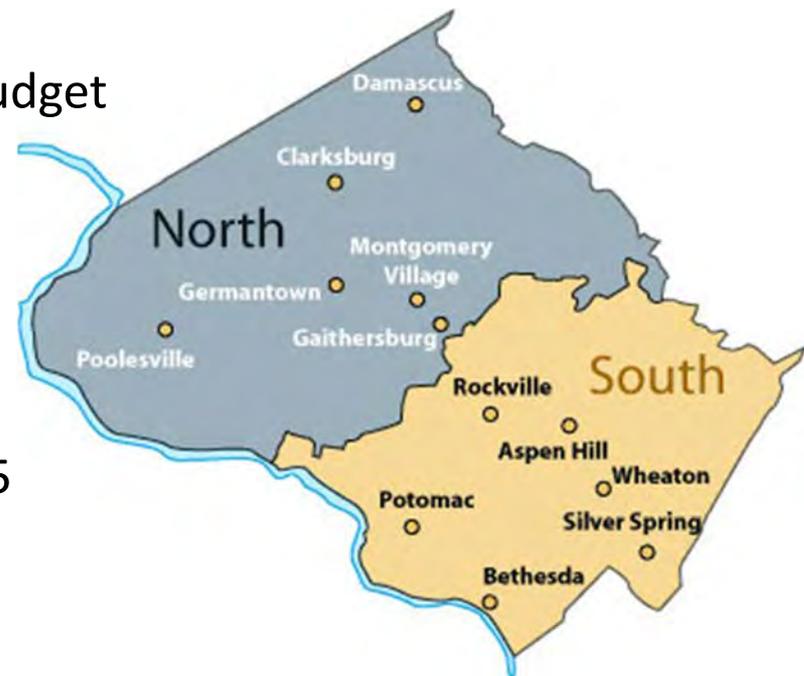
1.1 million residents

\$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



# 2. "Cutting edge" in both style & approach

## 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



**Calvin Gladney**  
@mosaicurban

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

1,369 FOLLOWING 2,319 FOLLOWERS

TWEETS TWEETS & REPLIES MEDIA

 Renaissance Planning Group  
2,932 followers  
7 hrs

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



Urban Development Area & Technical Assistance Program Recognized for...  
cityesthatwork.com

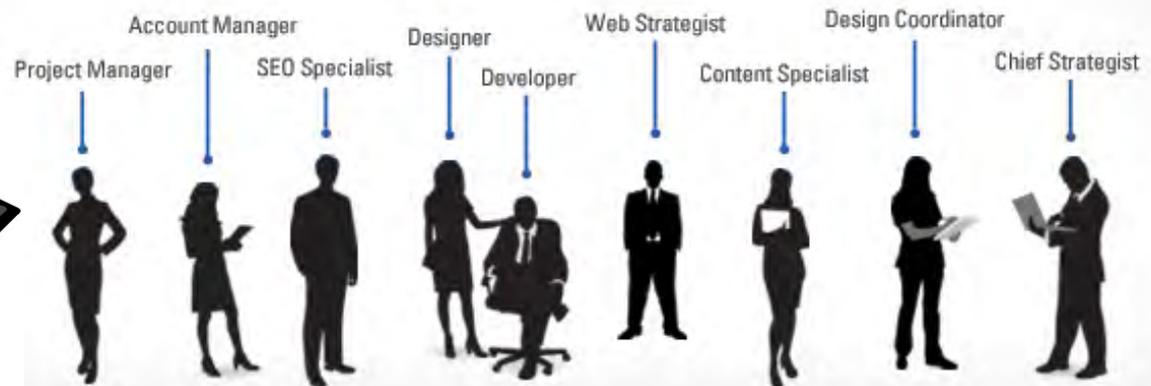
### 3. Understand the project goals

- **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](mailto:gwen.wright@montgomeryplanning.org)
- Follow me: @GwenLMWright
- Follow Planning: @montgomeryplans
- Facebook: [facebook.com/montgomeryplanning](https://facebook.com/montgomeryplanning)



A person in a dark suit and tie is shown from the chest up, with their hands held out. Overlaid on the image is a white network diagram consisting of circles connected by lines. Some of the circles contain a white silhouette of a person. The background is a light gray with a faint, larger-scale version of the network diagram.

Dan Berler  
Transportation Business Line Leader  
Battelle Memorial Institute

May 7, 2017

# Marketing Anxiety Bragging with Aplomb Focusing on Priorities

# Business Development Strategy

## Why do a BD Strategy?

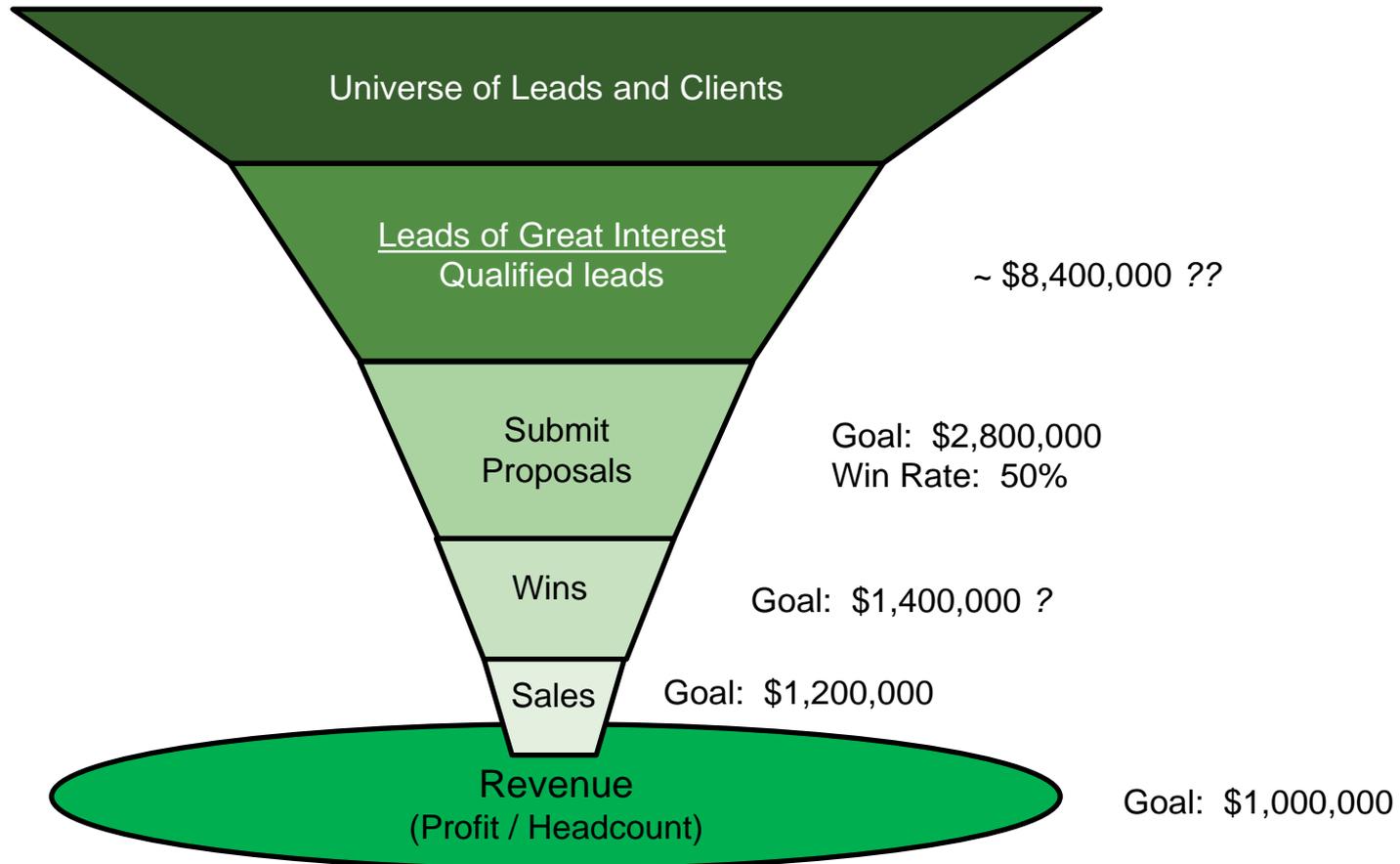
- Focuses your team's attention
- Gets everyone on the same page
- Allows you to communicate among yourselves and with others

## More importantly!

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



# The Pipeline



# The Relationship Ecosystem

**Deep relationships fill the pipeline**

**Clients pick people they know (trust)**

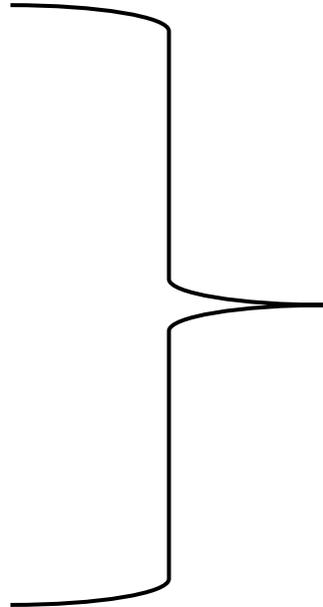
**The more complex the job, the more intricate the relationships needed**

**The best BD strategy is to do good work.**



# Doing Good Work and Delivering

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



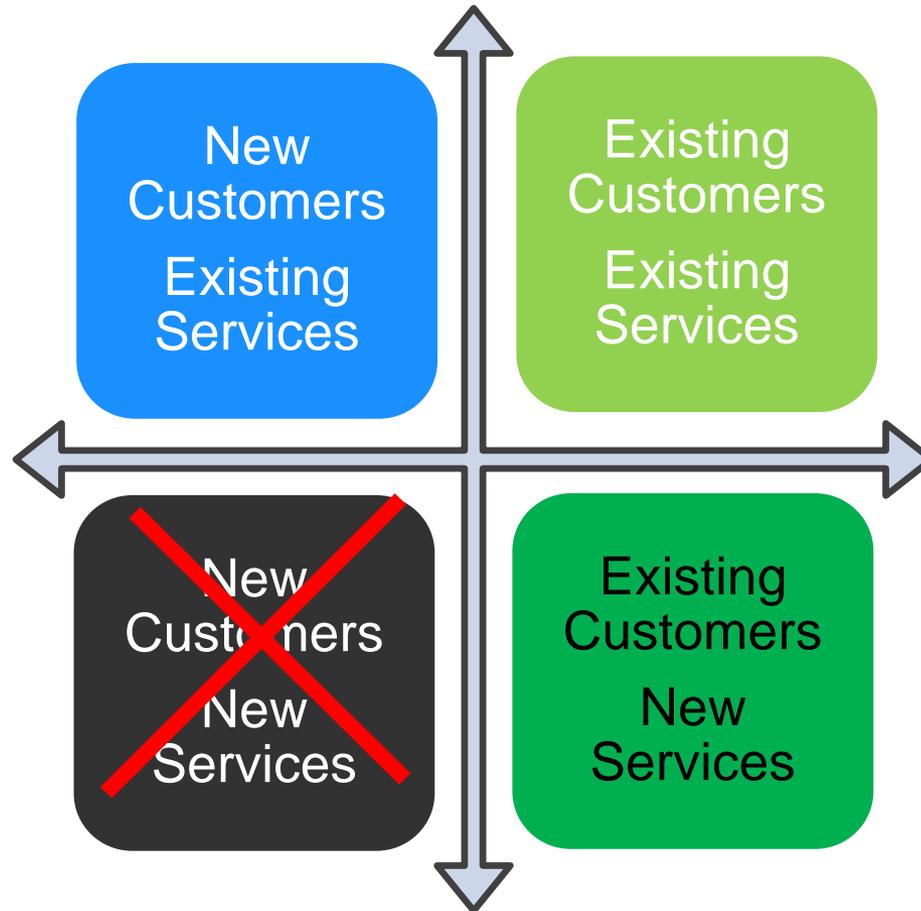
*Comfort*

*Confidence*

*Dependence*

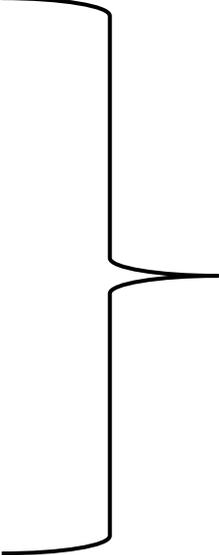
*Information!!!*

# Customers and Services



# 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

MARKETING ANXIETY:

# BRAGGING WITH APLOMB

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**ANNE F. MCBRIDE, FAICP**

OCTOBER 13, 2017

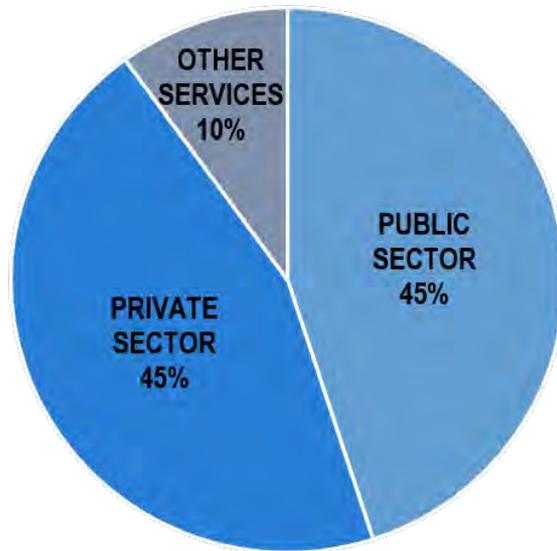
**McBride**DALE  
CLARION

# MCBRIDE DALE CLARION

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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

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- **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?

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- **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

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- **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.



CREW



NETWORK®

# BIGGEST MDC MARKETING TOOL

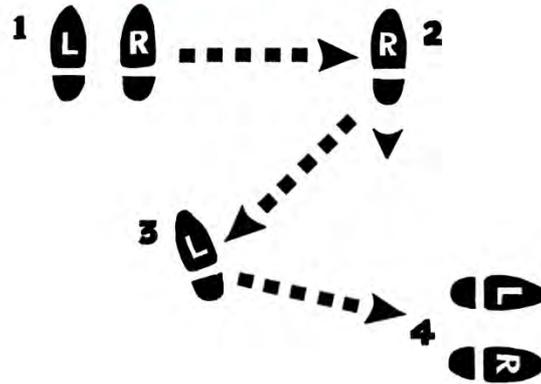
MICHAEL ALTMAN, TRIALOGUE STUDIO

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## Do good work and the clients will come



## Four Basic Steps to Build a Brand



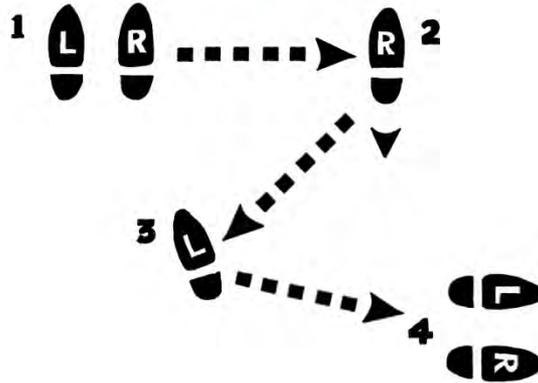
# BRAND

We're the best

- ~~logo~~
- ~~identity~~
- ~~product~~
- ~~service~~



## Four Basic Steps to Build a Brand

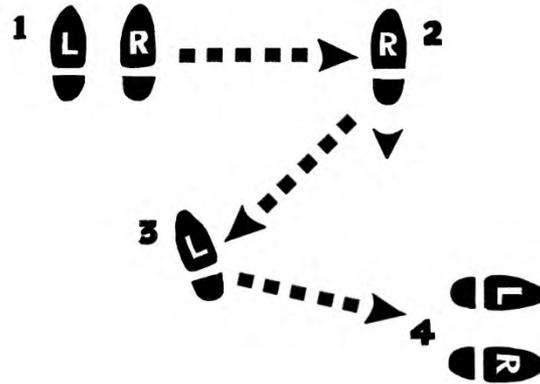


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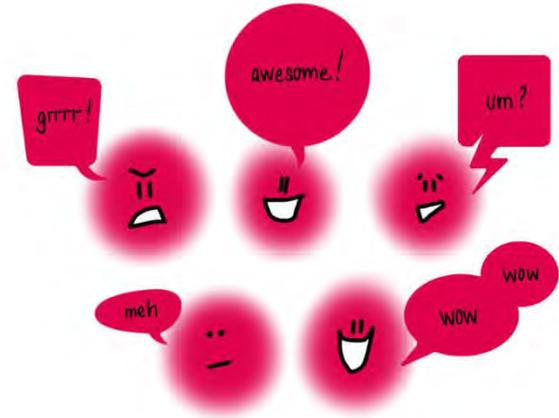
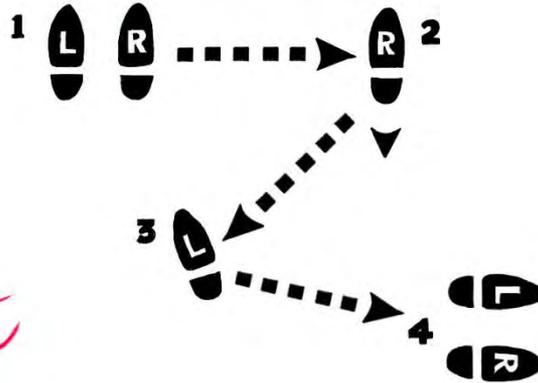
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## Four Basic Steps to Build a Brand



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



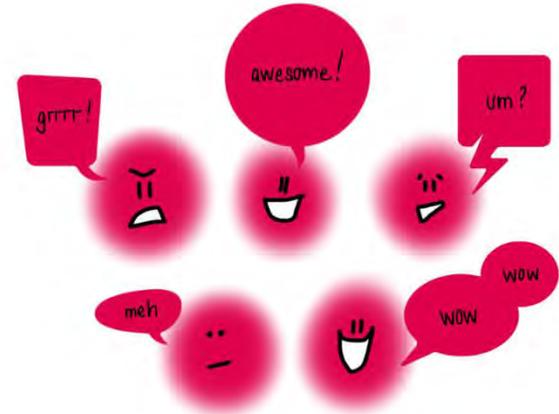
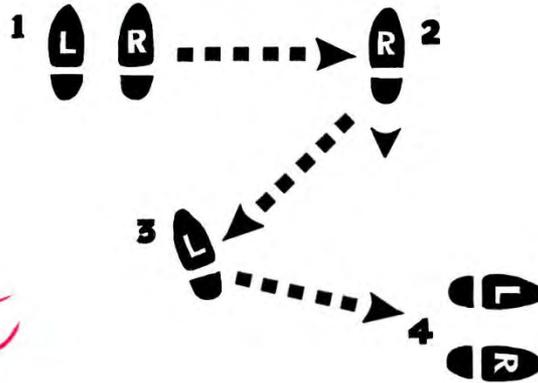
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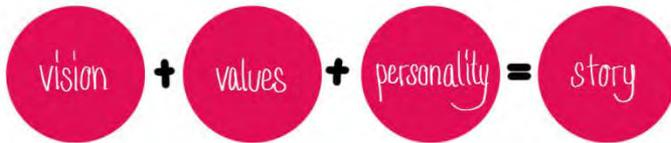


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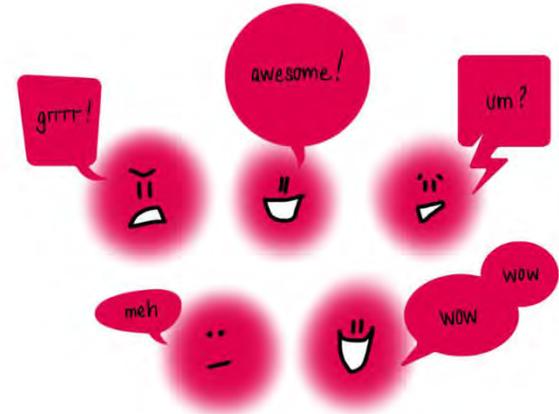
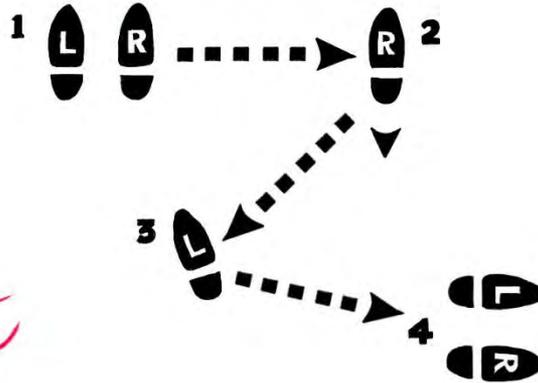
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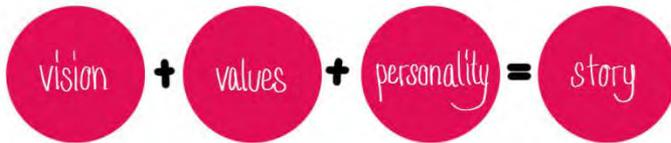


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- ✓ aligned
- ✓ believable
- ✓ relevant
- ✓ distinctive



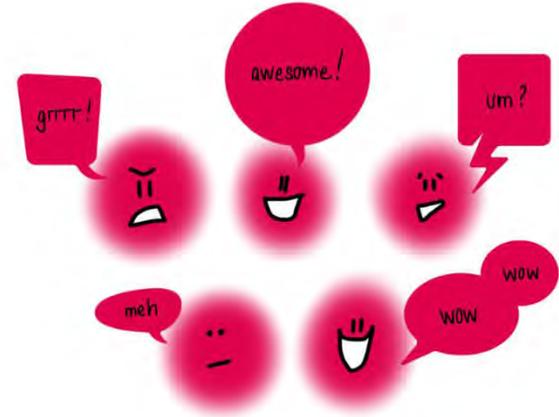
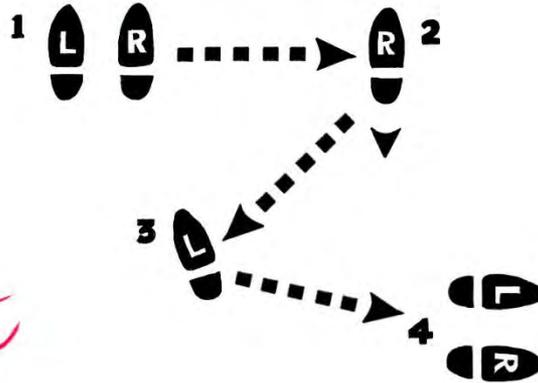
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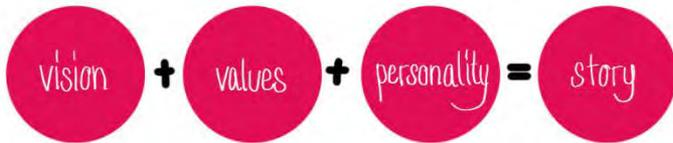
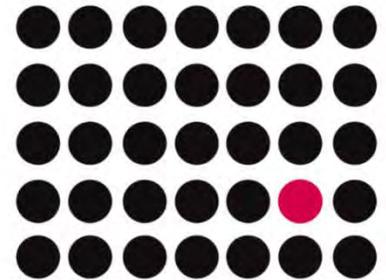


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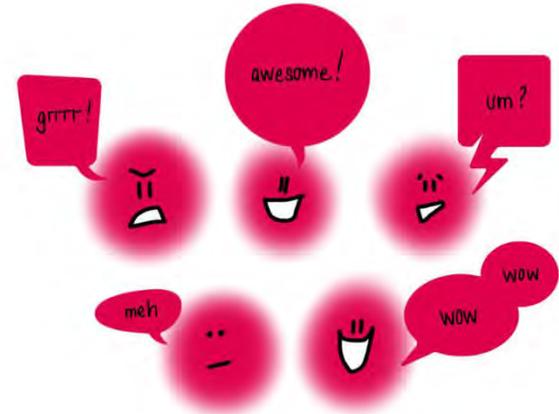
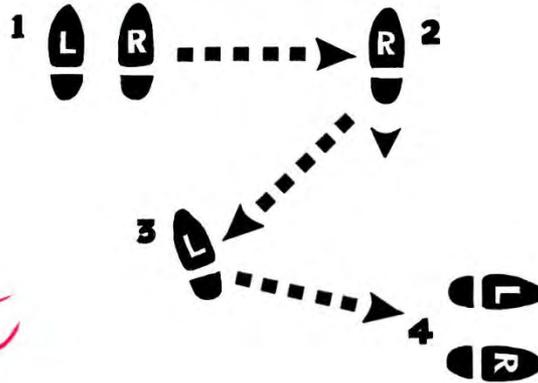
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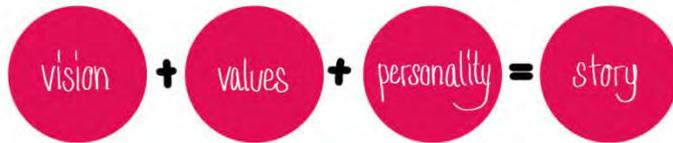
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## Four Basic Steps to Build a Brand



brand = reputation  
 reputation = trust  
 trust = reliability + delight

We are hardwired to notice only what's *different*!



- ✓ aligned
- ✓ believable
- ✓ relevant
- ✓ distinctive



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# Discussion

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For more information and  
to join:

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

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