



# MARKETING: MADE TO MEASURE

A Guide to Marketing Goals and Metrics  
for Architecture, Engineering and  
Environmental Firms

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# TABLE OF CONTENTS

<b>INTRODUCTION</b>	<b>3</b>
<b>LEVEL 1:</b> <u>Strategic Business Goals</u>	<b>6</b>
<b>LEVEL 2:</b> <u>Strategic Marketing Goals</u>	<b>9</b>
<b>LEVEL 3:</b> <u>Tactical Marketing Goals</u>	<b>24</b>
<b>LEVEL 4:</b> <u>Marketing Results Goals</u>	<b>27</b>
<b>GOAL SETTING:</b> <u>The Secrets to Doing it Effectively</u>	<b>31</b>
<b>OTHER INGREDIENTS:</b> <u>Utilizing Information, Planning and Management for Marketing Success</u>	<b>34</b>
<b>CONCLUSION:</b> <u>Made to Measure Action Agenda Sources and References</u>	<b>40</b>



# INTRODUCTION

- >[Introduction](#)
- >[Level 1: Strategic Business Goals](#)
- >[Level 2: Strategic Marketing Goals](#)
- >[Level 3: Tactical Marketing Goals](#)
- >[Level 4: Marketing Results Goals](#)
- >[Goal Setting](#)
- >[Other Ingredients](#)
- >[Conclusion](#)

## MARKETING: MADE TO MEASURE

Today, no topic is hotter in the marketing trade press than “marketing metrics” or “return on marketing investment.” White papers, academic journals, business articles, website postings, seminars and webcast events – are all chock-full of the topic of measurement – designed to satisfy an overwhelming appetite of executives today to “prove it.” It seems many are looking for guaranteed success, despite the overwhelming evidence that a well executed marketing program and the resulting awareness, differentiation and demand created, can be overwhelmingly powerful and provide significant ROI (return on investment). That’s not to say that financial discipline and rigor are not necessary. Professional marketers and

marketing leaders must “make the case” for their programs and efforts. After all, the well run and progressive architecture, engineering or environmental consulting firm is a business, not just a practice. Among other important goals, a central objective of the firm is earning a profit on their business investments.

However, marketing must be considered both on its immediate financial returns and the overall cumulative value gained from effectively creating market awareness and communicating the firm’s value proposition to targeted clients over extended periods of time. Sales cycles can be long in this industry. Maintaining a positive impression and providing value to potential clients in the absence of active project work will pay dividends in the long run.

>Introduction

>Level 1: Strategic Business Goals

>Level 2: Strategic Marketing Goals

>Level 3: Tactical Marketing Goals

>Level 4: Marketing Results Goals

>Goal Setting

>Other Ingredients

>Conclusion



### THE ON-OFF SWITCH AND “PROVE IT” VIEWPOINT

Unfortunately, many firms in architecture, engineering and environmental consulting fields operate as if there is a big on-off switch that controls their marketing. When the team is busy, the marketing switch is toggled to “off.” There are two common justifications for this. First, is the issue of leverage – if all hands are busy, then there’s simply no one available to do the marketing. The second issue is necessity – when staff and leadership think it is unnecessary because of an already full workload.

Inevitably, when conditions change and the business slows, or even collapses, the marketing switch is flipped “on.” Unfortunately the firm is now growling, hungry for work, lagging in new sales, billings, inbound collections and staff utilization. This is

hardly the point to support deliberate, patient and longer term investment initiatives. The only marketing focus that makes sense now is really sales (i.e., bring in some work now.) The team is driven to focus on finding quick hits, uncovering and chasing RFPs, cold calling prospects and even more desperate forms of competing. Sales or business development is indeed an important part of marketing, but it is most effective with a consistent, well executed marketing program behind it.

Operating the firm with the marketing switch toggled back and forth between “off” and “sales” not only results in suboptimal leverage and performance in the marketing system, but also reinforces a common, but dangerous, perspective that marketing program success can only be measured by final and ultimate results (revenues, profits and cash).



- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion



### AN ALTERNATIVE APPROACH: COMPREHENSIVE MARKETING GOALS AND MEASURES

In this report, setting specific goals – defining the metrics of success carefully and actively managing the effort, is established as the key to achieving sustainable marketing success. An alternative approach would be to focus significantly on marketing system activity and effort measures.

Additionally, this approach demands that goal setting and stewardship span across the complete business and marketing system (scale small and large, scope tactical and strategic, horizons short and long).

More specifically, this alternative management approach employs a model that details a set of comprehensive firm goals and objectives at four different levels of operations and the marketing system. These levels, and the objectives that cascade across them, are described in the model above.

This e-Book outlines the four levels of this marketing management model, what’s typically involved in each and how each level connects with others in the system. Along the way, examples of the types of objectives and measurable metrics that can be employed in each area will be discussed. In this e-Book, you’ll also find suggestions for general goal setting success and other ingredients beyond goals for the marketing success recipe.

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

## LEVEL 1: Strategic Business Goals



### Strategic Business Goals

Many design firms sing the praises of marketing importance, while simultaneously

missing the critical connection between marketing strategy and business strategy. Too many firm leaders define marketing as a set of specific and primarily sales-oriented tactics. However, the successful marketing program must connect outlined marketing efforts to the firm's overall business strategy. The place to discover this business strategy is in the firm's strategic business plan.

All too often, marketing is left out of the strategic planning process, and in some cases, leaders haven't shared the strategic plan with the marketers.

Meanwhile, these competent marketing practitioners are working in a leadership vacuum, cut-off from the firm's core differentiation, value message and focus of growth. These missteps can lead directly to others – for example, a creative and well-constructed newsletter, that lacks the important strategic message of the firm; or a refreshing update of the collateral design, that misses the new positioning strategy.

### Best Practices

*Key information that marketing should bring to the process includes changes in the market and potential*

*Marketing staff can get their seat at the table by being an important resource to the strategic planning process.*

*consequences for the firm, a thorough analysis of existing clients with both hard data (financial results) and soft data (client satisfaction ratings) to support recommendations, and meaningful measures to determine the effectiveness of marketing efforts.*

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

## Examples of Growth Objectives

### BY SIZE

- Grow net service revenue to \$40M
- Fill key positions and build total staff to 175
- Add one new office each year (to a total of seven)

### BY PACE

- Grow the firm's revenues by 15% each year
- Increase profitability by \$500K annually
- Raise effective fee rates by 12% in each contracting event

### BY QUALITY

- Increase profitability (% NSR) from 10 to 12%
- Convert ten or more B- and C-level clients to A-level
- Increase average client satisfaction scores from 3.6 to 4.0

Strategic business plans for the enterprise address many different topics, issues and opportunities, some well outside the purview of marketers and the marketing function. However, it's quite difficult to envision a comprehensive strategic business plan that does not include at least a few marketing-focused or marketing-connected components.

In particular, two enterprise-level strategic issues that provide critical context and connection to marketing planning:

- The firm's explicit growth objectives
- The firm's definition of its target markets

Growth objectives can be described both quantitatively (earn \$10M in revenue) or qualitatively (become a great place to work). The examples to the left list growth goals that directly impact marketing strategy and activities.

Similarly, the firm's description and definition of the target market or market segments are crucial to the marketing program. In fact, marketing theory elevates to a preeminent role these considerations – market segmentation, targeting and positioning – in providing a strategic framework to further delineate marketing strategies and plans.

Simply, the firm's target market is described across three dimensions. Commonly, the first of these is the services offered by the firm – professional, technical or managerial. Familiar examples include site-related civil engineering, architectural design, design-build management, environmental NEPA permitting or construction risk management. The second dimension is the client industries or types served by the firm, with examples such as mixed use developers, state highway authorities, high rise buildings,

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

## Example Goals for Firm Market Focus

### NEW SERVICES

- Purchase Aardvark Engineering to add electrical engineering to the Portland Area Mechanical Group
- Conduct client-based research to determine additional services they value that firm could add to its offerings

### SERVICES MIX

- Change the ration of environments/ geotechnical services from 35%/65% to 60%/40%

### NEW CLIENTS

- Diversify clients with push into stimulus-funded public sector projects

### NEW GEOGRAPHIES

- Open an office in Raleigh-Durham, NC.
- Close the Syracuse Office, and shift work to the Albany Team

### NEW DELIVERY CHANNELS OR SUPPLY CHAIN APPROACHES

- Continue sustainable growth (20% /year) of document production outsourcing
- Complete 35 % of next year's projects using BIM technology

or the petrochemicals industry. Finally, the third dimension is geography – the scale and breadth of the firm’s reach across the map. Applicable market geographies span all scales – common geographic reach includes local towns, cities and metropolitan areas; all or a portion of states; multistate regions; national; and select international or broadly global breadth.

The firm’s strategic business planning must include this defining and demarcating of the target market(s). This effort produces a number of enterprise scale objectives, closely related to and providing context for the organization’s marketing plans. Examples of these market goals are suggested to the left.

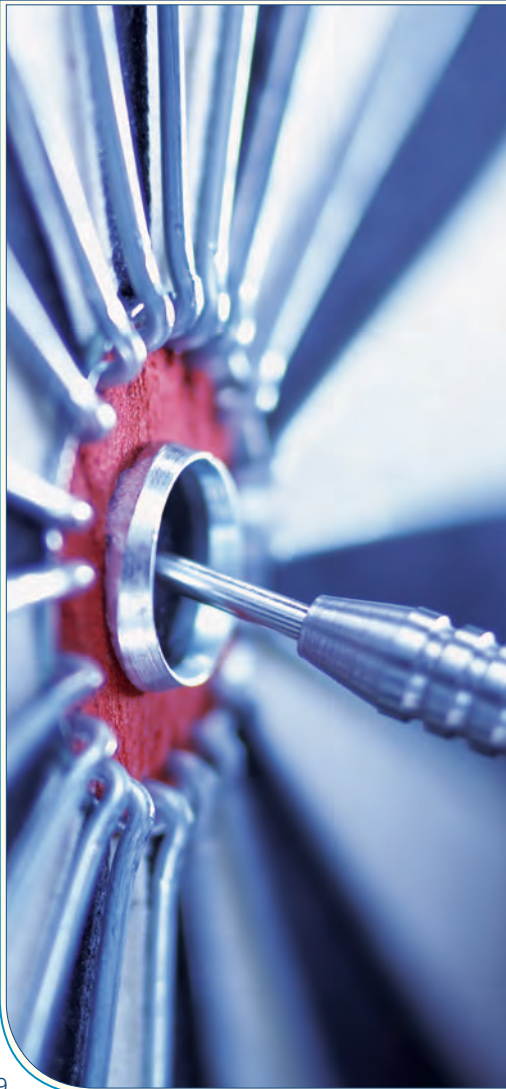
Progressive, strategically focused firms will explore, delineate and define a compelling organizational vision, and the overarching business objectives that support the vision. These highest, enterprise level (Level 1) growth and market objectives are of considerable importance to the firm’s marketing effort – creating a direct link to the direction and focus of marketing while defining the anticipated outcomes of successful execution. These top line goals (like all good goals) must be clear, measureable and meaningful, and pursued by the firm with vigor.





- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

## LEVEL 2: Strategic Marketing Goals



### Strategic Marketing Goals

Level 2 goals are similarly concerned with enterprise level strategy, but are, as a group, more specifically focused on the marketing function. Strategic marketing objectives address several core marketing concerns, such as the firm's market positioning strategy, marketing mix strategies, the marketing and growth implications of organization structure (in both the firm and marketing department), the marketing planning process, marketing or business development training for staff and branding strategy.

### MARKET POSITIONING

A well defined and robust positioning strategy is critical to differentiating architecture, engineering or environmental consulting firms. Most firm leaders grossly underestimate both the importance of positioning and level of effort required to achieve the objective. Positioning is not an overly complex concept. In fact, most principals instinctively understand and routinely use positioning strategy – in the context of an individual project opportunity.

Core positioning strategy is derived directly from: one – defining the organization's core competencies, two – matching those with target market demand, and three – discovering opportunities to distinguish the firm along these attributes.

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

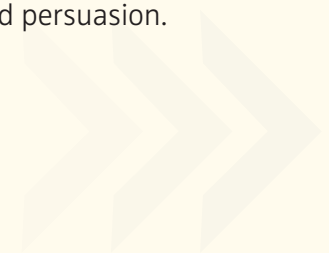
*“Effective market positioning requires success in two areas: one – crafting a meaningful, compelling and value-based message, and two – communicating and reinforcing the message in the market.”*

The company’s market position (a noun) is the reality of today (as understood by clients, prospective clients and the overall market). The firm’s market positioning (a verb) is that set of activities the organization undertakes to reinforce, enhance or change its market position.

Analysis of market position is assessed with tools that can include client feedback surveys, interviews or focus groups; market research on competitive share, customer and market trends; delineation of competitor strengths and weaknesses; and multilevel “positioning maps” that compare key attributes of competitors. Leaders should remember that effective positioning is always fundamentally concerned with differentiation – that is, setting the firm apart from its competition.

Beyond general business strategy, effective market positioning is fundamentally a marketing strategy, requiring success in two areas: one – crafting a meaningful, compelling, and value based message, and two – communicating and reinforcing that message in the market. Many architecture, engineering and environmental consulting firms fail in developing this message.

The core message describes the firm (who, what, where and how) but must also differentiate the firm – and suggests a reason (or value) for learning more. This second part – how the firm is different and why the client should care – is rarely addressed with the necessary power and persuasion.



- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

## Positioning Objectives

### POSITIONING

- Conduct client perception survey to gather and assess client feedback
- Develop SWOT analysis of primary competitors, and detail potentially exploitable differences
- Create “messaging team,” and gather together to develop core value proposition statement
- Develop and implement firm wide, two hour “Marketing 101” training module, including value proposition message, and elevator speech tactics

In fact, a truly unique value proposition hasn't really been required historically for design and environmental firms, but this is rapidly changing in today's increasingly competitive marketplace. To maintain, and certainly to gain ground, leaders and marketers must answer this fundamental client question: *so what?*

As firm principals assess the current reality of their company position, additional questions should be asked and answered.

- Does the firm have a core (value proposition) message?
- Is the message written down anywhere?
- Is it well (and consistently) understood by staff and clients?
- Is the message unique, interesting and compelling?
- Does the message drive consensus and alignment, or skepticism and argument?
- Can staff communicate the message using similar and consistent language?
- How can the firm improve the message and its power? What's our next step?

### Best Practice

*It may be helpful, in addition to articulating your brand positioning and key messages, to create a 'Message Infusion Tool Kit' that includes marketing templates such as client letters, elevator speeches and standard presentation slides using*

*your key positioning messages. These items can then be adapted by business units to differentiate their offerings and meet the needs of their market. Providing communication tools and training along with Key Messaging will increase effectiveness exponentially.*

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion



source: NetMBA.com

## MARKETING MIX

Early marketing management models of the 1950s-60s focused largely on consumer products, and grouped key marketing issue areas into “The Four Ps” of Product, Price, Placement and Promotion. Subsequent efforts have attempted to layer in new dimensions (additional Ps) to account for the complexity of multi-channel marketing, vertical supply chain marketing and services-focused marketing. The original concepts remain useful for general framing of the marketing system, while newer concepts force consideration of additional issues and opportunities.

### 1. Product

In professional services organizations the primary “product” is of course the firm’s services – technical experience and expertise, problem solving and solutions development, project or program management.

### 2. Price

Pricing strategy issues and concerns abound in the professional firm. Obviously these concerns often involve pricing issues per se – the price or bid of a particular project opportunity, the pricing level as established in the firm’s rate schedule, pricing positioning relative to competition, how often and how much rates are changed, how discounts are determined, and price consistency across market segments or specific clients. Pricing issues are also commonly linked to the firm’s contracting efforts and strategy – the mix of contract types (fixed price, T&M, cost plus), approaches to negotiation (“take it or leave it” or “what will it take?”) and how contract requirements effect the choice and development of opportunities.

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

## Examples of Marketing Mix Objectives

### PRODUCT

- Develop message and collateral for firm's IT technology consulting solutions package
- Redefine strategic planning consulting services into three "products" with specific scopes and pricing (silver, gold and platinum levels)

### PRICING

- Raise published rates by 7% on January 1st
- Increase the percentage of fixed price contracts from 12% to 15% next year

### PLACEMENT

- Deliver at least 35% of our architectural renderings and production documents from the centralized production facility next year
- Cultivate business development champions in each office to carry the growth message and push the region's specific client development plans

Pricing can also be a core component of the marketing message itself. Consider for example these familiar concepts: *expensive, but worth it, not the cheapest – but the best, and low prices, always.*

### 3. Placement

Placement is concerned primarily with methods and channels of distribution – how the firm's products or services move to market. Historically architecture, engineering and environmental services have largely been delivered locally, and this is still fundamentally true today. Marketing activities and messaging will reinforce a firm's location advantage, or overcome and diminish a perceived disadvantage. Too, the firm's distribution strategy and marketing efforts are often strongly influenced by the choice and focus of market segments and clients. For example, those that serve clients in municipal or town engineering, or a large standalone

industrial plant, will likely employ a local office focus. And those specializing in design of international space facilities, or world class forensic engineering, will probably leverage a broader, national or international focus and marketing message.

Finally, placement strategy must today also consider the effect on supply chains resulting from rapidly developing information technology and resources. Important improvements and evolution of general communication tools (phone, email, text, webcast) and systems (web resources, information sharing, social networking), as well as industry specific collaboration platforms (e.g., Building Information Modeling) are rapidly changing firm functions, provider roles and relative positions in the supply chain, the firm's very definition of who the client is, and perhaps most importantly, what is ultimately possible for services firms of all types and sizes.



- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

## More Examples of Marketing Mix Objectives

### PROMOTION

- Ramp up new content creation (especially white papers and technical blogs) and exploit recent technology upgrades to the website
- Roll out custom client planning process for top twenty clients (including the “twelve touches a year” program)

### PROCESS

- Define and document the “Johnson Way” for civil design; develop and publish marketing service sheet and other collateral

### PEOPLE

- Develop a marketing campaign focused on the unique experiences of our team, and how those benefit our clients

## 4. Promotion

Marketing promotion includes a host of well known and proven strategies and tactics that work to create or enhance awareness and demand for the company’s services. Some of these strategies involve “pulling” the customer toward the firm (e.g., brand advertising, public relations and branding in general) while other activities “push” the firm towards the customer (e.g., sales events, project or program discounts and personal selling). In all professional services marketing, the target market is small (relative to consumer marketing), typically ranging from one prospective client to a few hundred or a few thousand. At this scale, mass marketing approaches make very little strategic or financial sense. Effective promotional strategies, whether advertising, public relations, direct marketing or personal selling, must be highly targeted and appropriately scaled.

A few promotional strategies have historically worked very well in professional services, and appear particularly well suited to today’s crowded and hyper-competitive markets. Chief among these efforts are developing a content-based communications program and positioning the firm as a “go to” source of expertise, valuable resources and thought leadership; building and enriching client relationships focused on intimacy, trust and longer term commitment and mutual investment; and, redefining the firm’s value proposition to include not only the services offered, but also the identity of the user community and customer experience along the way.



## For professional services firms, the Four P's become Six P's:

1. Product (or Service)
2. Price
3. Placement
4. Promotion
5. Process
6. People

### OTHER P'S

As mentioned, newer marketing mix models have suggested additional strategic focus areas. Two particularly worthy of mention here are process and people.

#### 5. Process

Process strategy refers specifically to the "how" – how things are done in the organization and how the firm's unique approach differentiates it from competition. Some organizations employ quite unique operating methods, develop significant competitive advantage through them, and exploit these differences in their marketing. Southwest Airlines – a services firm – is a good example of both a successful operator and a great marketer. Most architecture, engineering and environmental consulting firms are significantly challenged with this notion, largely because their operations are all too plain and similar to one another.

Still, the opportunity exists to create value and differentiation not only through the service, but also through the process and methodology for achieving it.

#### 6. People

People strategy may, of course, be the ultimate distinction. After all, the team and organization itself is the fundamental differentiator of the firm. No other company or competitor can claim the same staff or professionals that do and accomplish the work. The trick is to develop the team into a powerhouse of expertise, experience and capability, one that is highly valued by the client. Then, the firm must translate its offer into client's need, focusing on client benefits and value, rather than on firm facts and features.

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

*“The correct organizational structure for a firm is the one that best leads to execution of the chosen business and marketing strategy.”*

## THE MARKETING SYSTEM

Other important strategic marketing components involve the firm’s marketing system and include organization structure, marketing planning and marketing/business development training for staff.

### Organization Structure

Organization structure in the professional firm is a rich and potentially complex topic, and certainly an ongoing challenge for many organizations. The dimensions of structure are varied, and can include geography, disciplines, functions, projects, studios, clients, and markets. Often the firm organizes around more than one of these dimensions, creating a matrix or hybrid structure.

All organization structure variants exhibit both positive and negative features, and addressing one issue often raises another. Still, two important points illuminate the structure discussion.

First, note that it is structure that follows strategy, not the reverse. Thus, by definition, the correct organizational structure for the firm is the one that best leads to execution of the chosen business or marketing strategy. Strategy is important, structure is a tool.



- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

## Examples of Marketing System Goals (Level 2)

### FIRM ORGANIZATION

- Reorganize Western Region (test case) from discipline-based teams to a client market-focused teams structure
- Identify market sector leaders for core markets and develop sector business development plans

### MARKET FUNCTION ORGANIZATION

- Add communication specialist to the marketing team
- Consolidate proposal coordination and development effort into central location at HQ office

### MARKETING PLANNING

- Establish process for annual marketing planning, and review, update, and improve the plan quarterly
- Roll out marketing plan communications "road show," to update each office on company focus and efforts

Second, whatever the chosen structure, all organization designs should explicitly consider and address the central importance of the client (or client market). Structures that primarily support internal firm objectives (efficiency, mentoring, collaboration) at the expense of external client or market objectives should be avoided.

Professional services firms are moving toward addressing both of these objectives. Increasingly, firm leaders are concluding that the old way (usually local area offices and/or disciplined-based teams) makes less sense looking forward. Many companies are evolving market-facing organizations, commonly structured around target markets, client types or individual client teams. Though challenging to implement, these new structures better support achieving client-centered strategies, and further differentiate the firm as a team of experts focused on the client's business or industry.

These firms are also evolving to address their own marketing function needs. More are moving "up-strategy" in the hiring of marketers, from coordinators (execute task) and managers (execute strategy), to directors (design and execute strategy) and CMOs (design and execute enterprise strategy). Additionally, progressive firms today are hiring other specialists for the marketing team – communications or public relations experts, graphics or creative types, writers or editors, branding experts and business development leaders – to balance out the common focus on opportunity development (proposals) in the marketing group.



- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

## Examples of Marketing System Goals (Level 2)

### BRANDING (TACTICAL)

- Update collateral materials during rollout of new logo and identity campaign

### TRAINING

- Create and deploy two hour "Marketing 101" video podcast for all staff; follow up with "fun test" to assure use of the video
- Hire outside consultant to deliver one day Business Development training for top producers and project managers; assess next step for "train the trainer" program

Many challenges remain, especially for smaller firms who need these marketing skills and competencies but can't (or won't) invest in building marketing staff. According to ZweigWhite's 2008 Marketing Survey of Architecture, Engineering, Planning & Environmental Consulting Firms, some 92% of organizations include a full time, dedicated marketing staff with a median ratio of one full time marketer per 27 of total staff (3.7%). The highest quartile of reporting firms (e.g., with largest marketing to total staff ratio) report nearly 5% of their staff assigned to the marketing department; smaller firms report slightly higher median ratios (from 25-49 - 4.4%; from 50-99 - 4.0%), but even mid market firms (250-499) include nearly 3% of their total staff in the marketing group.<sup>1</sup>

Staffing up the internal group is only one avenue for achieving the firm's marketing objectives. Teaming, partnering, and outsourcing of key marketing tasks and talents remains a potentially important and commonly under-considered opportunity for many firms.





- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

ZweigWhite's 2008 Marketing survey suggests that only 60% of marketing plans in this industry include a firm-wide marketing budget and revenue or sales goals.

### Marketing Planning

According to ZweigWhite's 2008 Marketing Survey of Architecture, Engineering, Planning & Environmental Consulting Firms, about 60% of firms report developing a formal marketing plan, with about 70% of these reporting an annual update frequency. The ZweigWhite survey data further yields that the 60% who develop a formal plan include in it a firm-wide marketing budget and revenue or sales goals (though in both cases the level of detail developed is unreported). Other sources suggest that it's a much, much smaller group that completes a formal but comprehensive marketing plan – probably less than 20-25% of all firms. The successful marketing planning effort must address explicitly all desired objectives. Without this comprehensive and detailed plan, the important stuff will simply not be accomplished by otherwise busy, distracted and sometimes marketing-skeptical organizations.

### Marketing/Business Development Training

Small businesses in general and professional services firms in particular, are well known as regular and even chronic under trainers. Many factors influence this: the explicit focus on tracking and maximizing billability; the craftsman-apprentice (mentoring) and on-the-job model of technical development; and the often intense pressure to reduce overhead. Moreover, far too many have experienced disappointment and low value in prior training initiatives. Each of these factors is real, and understandable in the context of the professional firm.



- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion



However, the notion of continued and chronic under-investment in the firm's most strategic core assets simply doesn't make sense. Progressive leaders focused on creating a lasting competitive advantage must reconsider – and work to train and develop core competencies and capabilities in staff, beyond what's needed in the technical discipline.

As detailed in ZweigWhite's 2008 Training and Development Survey of Architecture, Engineering, Planning & Environmental Consulting Firms, design and environmental firms spend a median of 0.6% of firm net service revenue (NSR) on staff training.<sup>2</sup> Upper quartile companies doubled this to 1.3% NSR in 2008, but this level is still substantially below figures offered by the American Society of Training and Development (ASTD) for organizations more broadly representing the domestic economy. (In prior surveys, ASTD has reported top quartile firms spending upwards

of 10% of NSR on staff development, as well as a strong link between training of the team and business performance and success.)

In the architecture, engineering, or environmental firm, this anemically low investment in staff training is diluted even further by the training's focus. ZweigWhite data says that in 2008, more than a third (36%) of the mean firm's budget focused on design or technical training, and another 17% was spent on related subjects such as CADD or BIM utilization. Concerning the remaining, non technical, "business" subjects, expenditures were reported as detailed in Figure 1 (see pg. 22); actual expenditures are also compared with the "importance" of these subjects as self-rated by survey participants.

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

On a scale of 1-8, participants in the 2008 ZweigWhite Training and Development Survey ranked marketing and business development training a 4.5 in importance but allocated only 6% of their training budget to such topics.

In this survey, the highest mean firm score for training importance was 5.1, for design and technical subjects. Given this, firm leaders seem to be acknowledging the relatively high significance of training in marketing, business development and other non technical subjects, while simultaneously reporting extremely low investments in these areas. Indeed, this is a common disconnect – principals who wholeheartedly agree with the importance of enhancing and better leveraging business development acumen, while simultaneously acting to expend essentially no effort in achieving the goal.

In particular, two significant training opportunities exist within the marketing system – each with a strong potential ROI.

First, growth-oriented firms should develop a basic overview and awareness course in marketing appropriate for the entire firm staff. This Marketing 101 initiative should cover the basics of marketing and business development, and how the firm translates concepts into action. Marketing 101, as its main purpose, increases each employee’s understanding of marketing, how the company operates and succeeds, and how each employee can contribute to the effort.

NON-TECHNICAL TRAINING EXPENDITURES (% TOTAL)		
Training Focus	Mean Firm Expenses (%total)	Rated Importance of Subject (1-8 scale)
Leadership	12%	4.4
Project Management	10%	4.7
Business Management	9%	4.6
Marketing and Business Development	6%	4.5

Figure 1: Non-Technical Training Expenditures [\*1-8 scale where 1=least important, 8=most important]

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion



The entire staff is involved, with the premise that everyone is in the marketing department. The Marketing 101 course will typically span about two hours of time and can be completed in modules, as Lunch & Learn sessions, delivered live, as webcasts, or as asynchronous video downloads.

The second step is a basic but comprehensive and action-inducing seminar in Business Development, targeted at design and technical professionals in the organization. Though typically best-suited for those with a few years of project work under the belt, this session helps all professionals – project managers, senior technical experts, middle-and upper-line management, and the executive team – to improve their own business development skill and acumen.

The course is typically presented in day-long format, with several business development subject focused modules, and including interactive and participative workshop components. Importantly, an expected outcome of this “Business Development for Technical Professionals and Managers” is action – planning and executing specific improvements in each attendee’s business development effort.



- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

*“Effective branding involves creating a special identity for the organization, one that is interesting, attractive and meaningful to the customer.”*

## BRANDING

Branding is the very essence of marketing – it’s at the core of the entire marketing system and program, and is perhaps the preeminent strategic marketing objective. Effective branding involves creating a special identity for the organization, one that is interesting, attractive and meaningful to the customer. Branding is much, much more than the logo, color scheme and look and feel of collateral materials.

Branding envelops all of the firm’s marketing effort, and the results of those efforts, in the identity and culture of the firm, along with the identity and culture of the client, customer and user community. For the purpose of this report, the term “branding” is virtually interchangeable with “marketing.”

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### *Best Practice*

*One of the challenges in communicating a desired brand positioning to the marketplace is how to capture the complete feeling of the brand – the entire story of the company’s distinctiveness – in just a few*

*memorable words. We call this distillation of the brand platform the Single-Point Message. Often distilling your brand message into a single point can result in creation of a tagline that can be used across your marketing program and communications channels.*



## LEVEL 3: Tactical Marketing Goals

### Types of marketing tools that can be employed in the communications plan:

- Journals
- Newsletters
- e-zines or e-newsletters
- Research reports
- White papers
- Published articles
- Websites
- Blogs
- Case studies
- Press releases
- Business development letters
- Social media



Tactical marketing objectives span the marketing function, but are largely concerned with shorter term activities and actions, and commonly answer the question “what are we doing this year?” Tactical marketing objectives are most commonly categorized into three groups: communications, activities and business development.

### COMMUNICATIONS PLAN

Marketing communications encompass many distinct, traditional tactical marketing activities, such as promotional campaigns; business development-focused direct mail efforts; press releases and public relations materials; collateral material development and dissemination; newsletters, journals and e-zines; sales-oriented and general message

advertising; and, increasingly the use of social media platforms and tools. Today, the most effective marketing communications programs focus not only on the tool or tactic employed, but on the content delivered – that is, creation and dissemination of information and resources useful for clients, prospects and the general market. Developing a comprehensive communications plan around this content creation and dissemination mimics the approach of more explicitly content-driven businesses (like newspaper or magazine publishers), and as such are sometimes called “editorial calendars” – terminology that nicely highlights the importance of an ongoing, deliberate and message-focused program. Positioning the firm as a go-to source of expertise has always been an effective marketing strategy – today content has arguably become the effective marketing communications strategy.

## Common Marketing Activities:

- Attend or host seminars or Lunch & Learns
- Attend, participate in or moderate conferences
- Provide webcasts
- Host open houses
- Attend or host sporting events
- Support and attend charity events
- Make client relationship management visits to existing clients
- Make opportunity development sales calls or visits

## ACTIVITIES PLAN

Many planned marketing activities (think 'golf tournament') are less frequent or repetitive than communications efforts, and they can be more complex or involved to design and execute. Perhaps the most common pitfall to success is simply not doing anything, and the primary path to doing (acting) begins with commitment. The secret to commitment is simple – scheduling – penning the planned activity on the calendar and then managing to the deadline. Thus, the strategy for success focuses on an activities calendar, a central and shared point of contact for the entire firm's marketing related events.

An important note on developing an activities calendar – make sure you can tie your activities back to strategy and that you understand how different activities serve different purposes. Specific objectives should determine the marketing vehicle you select.

Often, someone decides to do a newsletter without understanding that there are more effective vehicles for meeting your marketing program objectives.

## BUSINESS DEVELOPMENT PLAN

Developing a separate business development plan is also recommended, defined along three specific perspectives of focus:

- Personal business development plans for individuals, including creating a personal marketing kit, developing personal communications or activities plans, detailed commitments for sales call activities and customized plans for specific clients
- Custom client plans developed for priority existing customers, outlining a comprehensive plan of attack for each client
- Pursuit or capture plans for specific opportunities (identified or expected), projects or proposals forthcoming, or expected to develop during the plan horizon

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

Creating goals that are too vague, too general and simply not measurable is a very common mistake.

Often, there is substantial overlap in the three plan views. Still, focusing on the growth effort from all three perspectives – individual staff, individual client and individual opportunity – helps to ensure that all important opportunities are covered, and that roles and responsibilities in the firm are clearly identified and understood.

### MEASURING AND EVALUATING AGAINST INDIVIDUAL BUSINESS DEVELOPMENT PLANS

There are a number of efficiency measures that can be used to evaluate progress against individual business development plans. It is first necessary to set a baseline for current activity and then evaluate the following:

- Increase in number of client/prospect contacts
- Increase in attendance at events and conversations containing key messages
- Increase in number of speaking opportunities and numbers of attendees
- Increase in the requests for information or requests for proposals
- Increase in the number of committees and participation in those committees

## LEVEL 4: Marketing Results Goals

### Tactical Marketing Activity Goal:

Publish (twelve) monthly  
press releases.

### Marketing Results Metrics:

Number of “hits” in press  
publications; number of  
inquiries from press releases;  
number of other links or  
connections to press releases.



Level 4 is a more direct measurement of tangible results from the marketing effort. However, many of the metrics remain indirect and activities focused – as only a part of the marketing results dashboard is comprised of hard metrics (dollars won, checks cashed or profits enjoyed). The premise is not to deny the central importance of revenue, profit, and cash but to underscore that success comes from measuring effort and results all along the cascade from strategy to results. Results metrics often flow directly from Level 3 efforts, as outcomes of initiatives in the tactical plan.

Level 4 is a more direct measurement of tangible results from

Marketing results goals measure outcomes of the firm’s marketing program that we know (or strongly believe) to be hard wired to success. Theory, experiences, and competitive best practices point these outcomes directly to hard results – sales, revenues and profits. Results-based objectives can be categorized into three groups, based on the type of outcome anticipated:

- Creating Awareness
- Creating Opportunities
- Creating Sales



- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

*“Because architecture, engineering and environmental consulting firms typically get around 80% of the business with existing clients, the awareness issue is not always obvious.”*

## CREATING AWARENESS

Before the firm can create and nurture demand for its services it must first build awareness of the organization, team and capabilities. Because architecture, engineering and environmental consulting firms typically get around 80% of business with existing clients, the awareness issue is not always obvious. But central to marketing success is that increased awareness leads directly to increased connections (quantity and quality) – and that this will in turn lead directly to an increase in opportunities.

A firm desiring sustainable growth depends on this, and must feed its opportunity machine with new connections and leads.

Many metrics can be used to measure awareness. Some examples include number of website visitors, number of click-throughs to certain pages, subscribers for e-Newsletters; subscribers for paper newsletters, press hits, specific responses to marketing communications, numbers of in-bound inquiries and number of contacts in the CRM database.

### *Best Practice*

*Social Media gained consistent traction in 2009. In 2010, the discussion is about more clearly connecting social media to business objectives, and better understanding how to measure the direct and indirect*

*return on investment of social media. It is important to understand how social media is being adopted in your client markets in order to effectively leverage this new media channel. Try Social Media B2B to get a broader understanding of the impact of social media on B2B companies. [Socialmediab2b.com](http://Socialmediab2b.com)*



- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

## Marketing Tactics Best Suited to Creating Opportunities and Generating Leads:

- Premium Content offering information of value to clients
- Print or e-Newsletters focused on industry topics
- Speaking engagements
- Published articles or technical papers

## CREATING OPPORTUNITIES

The greater the number of inquiries poured into the business development funnel the better. This doesn't mean that the firm must pursue all leads or take all jobs. And subsequent to the inquiry or lead, several other metrics are derived directly from the pipeline. The firm's upstream marketing efforts exist to generate these opportunities, and it's incumbent on management to pay close attention to them as they progress through the prospect management process. Examples of metrics commonly measured include: the number of leads developed,

pursued and turned into interested prospects; number of prospects further qualified for fit with firm; number of proposals developed; number of RFPs received or uncovered; number of proposals shortlisted; number of presentations delivered; number of proposals or presentations leading to project wins; number or percentage of repeat business; number of referrals; and, number of new clients. Moreover, note that most of these metrics can be measured and expressed in three ways – absolute value, conversion ratio and change over prior period.

### *Best Practice*

*Services marketing at the opportunity stage is heavily focused on the "proposal" and most firms have adopted formal Go-NoGo decision making processes to determine which requests for proposals receive priority resources. In your vetting process, it is helpful*

*to understand what led your firm to be invited to propose or if you used a service to find the RFP. You should track the source so you can evaluate your hit-rate based on this information. This information will help you better evaluate the probability of success in the future based on how the lead is generated.*

*to understand what led your firm to be invited to propose or if you used a service to find the RFP. You should track the source so you can evaluate your hit-rate based on this information. This information will help you better evaluate the probability of success in the future based on how the lead is generated.*

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

## The “Hard” Metrics of Marketing Results:

- Sales
- Billings
- Gross Revenue
- Net Service Revenue
- Gross Profit
- Net Profit
- EBITDA
- Growth Rate, Revenue
- Growth Rate, Profit
- Utilization %
- Multiplier
- Effective Fee Rate
- Revenue per Head
- Profit per Head
- Days Sales Outstanding
- Write-Offs/Write-Downs

### CREATING SALES

The final stop: sales, revenue, profit! Organizations do use slightly varied definitions for these, but common end point goals include sales, billings, gross revenue, net revenue, gross profit, net profit, EBITDA, and profit percent of revenue. Other end of process metrics might include items such as number of clients retained, number of ongoing projects or subscriptions reauthorized, and feedback on client service and satisfaction. Related measures of financial or general business success include day's sales outstanding in A/R balance; amount of revenue write-off; numbers of complaints, claims, or lawsuits; individual or organization utilization and multiplier (and together revenue factor). Because these measures of success are often directly tied to client success and satisfaction, and broadly to the firm's reputation of service and expertise, tangible company success

can again be linked to the firm's brand, differentiation and market position – and thus to the effectiveness of the organization's marketing program. Put another way, the results of true differentiation in the brand and firm can be seen and felt at the bottom line, and taken and deposited in the bank.

Indeed, in the final analysis, the marketing investment must tie back to the firm's financial performance. Marketers and firm management should closely monitor and manage the marketing effort and the firm's overall performance, all the while searching for a clearer connection between the two.



# GOAL SETTING:

## The Secrets to Doing it Effectively

### Ten Defining Attributes of Good Goals:

1. Specific
2. Clear
3. Direct
4. Outcome-based
5. Measurable
6. Actionable
7. Accountable
8. Timely
9. Prioritized
10. Meaningful

The core of this message is the opportunity, and indeed necessity, for firm leaders to define and measure marketing success more comprehensively, with cascading objectives spanning enterprise strategy to marketing strategy, tactics, and ultimately results. Succeeding in this is dependent on setting and achieving the goals as specified.

Effective goal setting is a relatively straightforward endeavor, but achieving success can be quite challenging. Leaders must often return to the basics, to reflect, reassess, and sometimes relearn what's required to capture real success in business and in life. The pitfalls are common, but practice and commitment go a long way to improving performance.

There are ten defining attributes of "good goals" – those that lead to achievement of desired results, and to organization and personal success.

1. **Specific:** A common pitfall is defining goals too generally. More specific (clear, concise and measurable) goals get done. Thus an objective to "write more original content this year," is much more likely to be accomplished if it is rephrased as "write two white papers in Q1 on healthcare facility design trends."
2. **Clear:** Goals must be clear and to the point. Transparency and understanding are key. Motivation to be less clear or transparent should be reviewed. For example, an objective to "maximize profit" may 'hide' the owner's underlying goal of a \$500K year-end distribution, but the goal's ambiguity increases the chance of failure. The writer should instead define a clearer alternative – "achieve \$500K in pre distribution profit" is better; further consideration for incenting staff could improve the goal even more.

When setting goals, the most important step is assessing the ability to execute in terms of capabilities and commitment.

3. **Direct:** Good goals point directly to the achievement of an important outcome. Leaders must continually ask if the goal in question will help to achieve the strategy. For example, if the growth strategy describes “positioning the healthcare studio as a team of industry experts,” then an action to “write and publish a whitepaper on design trends for day surgery centers” will likely work better than “making sales cold calls to hospital developer clients.”
4. **Outcome-based:** Goals should detail expected outcomes. Those objectives with a clear payoff are pursued more vigorously. Outcomes can be either positive “here’s what I’m going to spend my bonus on,” or negative “if we can’t be a leader we’ll get out of this market.” As Steven Covey suggested, the point is “to begin with the end in mind.”
5. **Measurable:** A good goal is measureable, often both in completion and in progress toward completion. Any objective lacking a discrete action set including a tangible completion point will likely fail. Remember what Peter Drucker said, “if you can’t measure it, forget it.”
6. **Actionable:** An effective goal should motivate action, providing an understanding of what to do. More tangible, specific, and measureable goals necessarily focus leadership and staff on what is required to achieve the desired objective.
7. **Accountable:** It’s not the goals that are accountable, but effective goals should document individual responsibilities for action. An individual must be accountable (not a team). This doesn’t mean the individual in charge must do everything – teamwork can be critical to achieving many goals. Yet, individual accountability is more effective in meeting objectives.
8. **Timely:** Good goals support timely action. Deadlines must be tangible and firm. “The training session will be developed and documented by December 1,” is a pretty unambiguous goal. Here “December 1” is better than the more common “in 90 days” (from when? business or total days?). And either of these is preferable to “as soon as possible” or “ongoing,” two very vague statements that are commonly employed in strategic, annual business and marketing plan documents.

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

Simply setting goals without execution is nothing more than dreaming – leaders must do, act, and execute.

Action is a true differentiator.

9. **Prioritized:** Goals should address important priorities. Priorities might include expected return on effort, the magnitude of the outcome, or the time horizon for achievement. The firm should pursue a mix of objectives – short and long, simple and complex.
10. **Meaningful:** Goals should focus on matters the company and leadership care about or that will make a difference in the firm. Passion drives action and achievement.

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### **Best Practice**

Goals should be set at each level of the planning process. High level revenue goals are part of most strategic planning processes but the most meaningful goals are those that are driven down into the organization

to an actionable level. For example, it is much easier to develop marketing programs around a goal of increasing transportation work in a specific geography by a percentage than a goal of increasing revenue by a percentage.

## OTHER INGREDIENTS: Utilizing Information, Planning and Management for Marketing Success

### The Other Ingredients:

- Information
- Accounting Systems
- CRM Systems
- Planning
- Management

Developing and executing the more comprehensive program of cascading objectives is central to achieving real marketing success. Better goals, measured broadly across the enterprise effort, will lead to enhanced marketing system performance and ultimately to growth and profit.

Beyond enhancement of the system for setting better and more comprehensive goals, the firm's marketing success is linked also to other systems, technologies and operational best practices. In particular, attractive opportunities exist for architecture, engineering and environmental firms with information, planning and management.

### INFORMATION

Management efforts in the design or environmental firm are often hampered by a lack of meaningful, timely and useful information. Information systems (e.g., accounting, client management and knowledge management) simply don't deliver what's needed. This is often the result of several issues: lack of knowledge or understanding, lack of investment, underutilization of existing capability, poor compliance with existing business procedures, or misaligned management systems, roles, and expectations. Whatever the reason, progressive firms are today changing this situation. The information and analysis necessary is not terribly complex, but a lack of basic information is unacceptable for organizations pursuing improved performance. Firms must deploy and more fully leverage appropriate technology in this pursuit.



- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

How do we get the right client information to the right resource at the right time to make informed business development decisions?

### ACCOUNTING SYSTEM

Managers need timely information to affect the course of a project, group or initiative. Business analysts need more comprehensive information to understand what's working and what isn't. The organization's accounting system should provide considerable data for this. Most firms get the basics of project and general accounting done, but many can't properly analyze operations by geography, client or individual project performance, or sometimes even see profitability results in reasonably current time. A good and well deployed accounting system will support these objectives and more.

### Best Practice

*The most important benefit of a CRM system is that it gives you a client-centric view of your data, rather than a transaction-centered view. Integrated CRM systems that tie in with your financial and project management systems provide the added benefit*

### CRM SYSTEM

As with accounting systems, rare is the firm that fully leverages the capabilities of CRM (customer or client relationship management) technology. CRM offers a powerful tool for firm management, work collaboration, knowledge transfer, and sales and marketing success, but is quite often not leveraged with professional services firms. Many organizations (including those both small and large) have essentially no CRM system, relying instead on individual staff, and their private files, rolodexes, and Outlook lists for information sharing within the firm.

*of delivering instant access to historical client information such as annual revenue/billings, project variances and profitability by project type. When choosing a CRM system, look for a system that is flexible, agile and able to enhance productivity within your existing operations. [Learn about Delttek Vision CRM](#) or [Request a Demo](#).*

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

*“The CRM system offers improvement potential in multiple ways – better management of a particular opportunity, improvements in the process for developing all opportunities, and gains in the organization’s overall success with business development.”*

CRM systems support marketing in two primary ways: contact management and prospect management. A central dataset of client and contact information offers the promise of capturing and building ever richer client information. When supported, the database grows and improves through time, eventually transcending individuals and teams, and can ultimately become a highly valuable and strategic firm asset. And of course the database offers numerous opportunities for enhancing client relationships – through better information, analysis, understanding, and action.

The system’s prospect management functionality supports tracking opportunities through the development cycle (leads, prospects, proposals, presentations, projects). The CRM system offers improvement potential in multiple ways – better management of a particular opportunity, improvements in the process for developing all opportunities, and gains in the organization’s overall success with business development.

### **Best Practice**

*Sometimes the best advice comes from your peers. Read CRM success stories from:*

- [Baxter & Woodman](#) – A 225-person engineering firm
- [Garver Engineers](#) – A 375-person engineering firm
- [Schirmer Engineering](#) – A 275-person engineering firm (Video)
- [FKP Architects](#) – An 86-person architecture firm
- [MACTEC](#) – A 3,000-person engineering, design, environmental and construction services firm

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

## Devising Your Strategic

### Business Plan:

- Values
- Mission
- Vision
- Business Model
- Market Focus

## PLANNING

Top firms pursue a deliberate and coordinated effort to design and achieve success, addressing issues from the highest level to the most detailed. And though not obvious to all, clarity of purpose, message, and focus in the marketing system requires clarity of vision, mission, and strategy at the enterprise level. The firm must have a Strategic Business Plan which provides this broader framework of one – values (who we are and what we stand for), two – mission (why we exist), three – vision (where we are headed), four – business model (how the firm builds and exploits its competitive advantage) and five – market focus (the firm's target markets or client sectors, services capability, and geography covered). Then, building on this context, the team completes its high level framework through addressing the strategic marketing issues including positioning, marketing mix, marketing system, and branding components.

The well managed firm will also have an Annual Business Plan, detailing a roadmap for the current year. Most architecture, engineering, and environmental consulting firms do, but these often lack both a comprehensive focus (planning across multiple business issues) and detailed objectives (specific and actionable goals for each strategic area). The annual plan should reference and connect to the longer range strategic plan. Any disconnect should be addressed immediately, to realign the focus and effort of the management team and staff.

Finally, the Annual Marketing Plan is simply a subset of the Annual Business Plan. (More accurately, the firm's Marketing Plan should address both strategic and tactical components, with the bulk of yearly actions usually favoring more detailed tactical execution. )

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

*“...marketing success calls for proactive and action-oriented management – monitoring, controlling, analyzing, adjusting and improving...”*

## MANAGEMENT

Finally, marketing success calls for proactive and action-oriented management – monitoring, controlling, analyzing, adjusting and improving – in both the marketing plan and process.

The firm’s management approach and systems can be highly structured or rather loose; policies and procedures may be well documented or not written at all; training and mentoring can be quite formal or virtually ad hoc. Many variations of this “loose-tight” principal do in fact work in the firm. There are as many “right answers” for firm management systems as there are firms. Ultimately the correct approach is the one that works, fitting the structure, culture and values of the company.

**Reporting Processes** – Effective management relies on timely, accurate, and pertinent reporting of information, used in making better operational decisions, in understanding what is working and what isn’t, and to enhance the efficacy of plans and actions in real time, with the game in progress.

**Communications Processes** – Effective communication – transfer of knowledge, and clarity of mission, message, roles, and performance expectations – are often lacking, particularly in design and environmental industry professional firms. The marketing-oriented firm attacks this issue directly, approaching internal communications like external ones, in effect “pursuing” staff just like clients. Developing an explicit communications architecture and system often leads to significant growth in marketing leverage – as everyone becomes a part of the marketing team.

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion



**Training Processes** – Effective management requires knowledge and skills, and the progressive firm develops managerial and business competencies right alongside technical prowess. Principals and professionals should be exposed to development in marketing, business development, and effective leadership and management techniques. Moreover, those with talent and skill in these areas must be encouraged to share and develop others. The hypercompetitive markets of today and tomorrow demand nothing less than a fully leveraged staff, all contributing meaningfully to the marketing and business development challenge.

**Change Management Processes** – Successful firms react appropriately to changes in the business, and adjust their focus to better address new challenges and opportunities. Some components of the firm change infrequently (values, mission, vision), others occasionally; still other areas (especially many goals and action agendas) will be in a near constant flux and adjustment, in response to changing assumptions and evolving market and organization conditions

**Best Practice**

*Depending on how well established your current marketing program is, the process of implementing new processes and new measurement systems takes time and patience. It is important to clearly communicate*

*the information, then communicate it again. Make sure expectations are set forth and provide local resources to help with implementation and to keep things moving along.*

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

## CONCLUSION: Made to Measure Action Agenda

*“Gone are the days of the ‘good work sells itself’ marketing strategy.”*

As architecture, engineering and environmental consulting firms look to 2010 and beyond, it’s clear that forward thinking leaders must work smarter, to position their firms for success in an increasingly demanding, competitive, and rapidly evolving marketplace. Gone are the days of the ‘good work sells itself’ itself marketing strategy. Sure, technical knowledge, discipline expertise, and project delivery experience will remain key components of firm success – but these will increasingly be commoditized – table stakes for getting into and playing the game. The progressive firm will deliver great work and be an effective marketer – a go-to source and thought leader of information and expertise; a consummate builder and nurturer of relationships and trust; and an organization known for delivering a distinctive service experience along with the project solution.

Attaining this high level of sustained success will demand a whole new view on what marketing is (and requires), and how the organization’s marketing efforts must integrate into and become a part of the firm’s operations, culture and identity. Leaders have little hope of achieving strategic integration of marketing and operations without a comprehensive, end-to-end marketing management system that is comprised of a defined set of marketing goals and measures that will cascade through the firm’s business systems. This new, comprehensive system should include operational strategy, marketing strategy, marketing tactics and marketing results. Exactly what to measure at each stage will be a function of the firm’s mission and vision, business strategy, market focus, and short and long term objectives. But no firm can expect growth and success as an entitlement, or simply through flipping the marketing switch to “more sales” when the backlog drops.



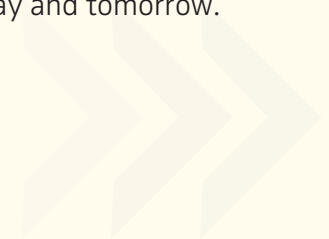
- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

The global economy, technology and client markets themselves all point to significant change – prepare yourself now for the future by embracing a metrics-driven marketing program.

Top companies will set comprehensive growth and marketing goals and plans, will steward and manage these efforts more consistently and over longer periods of time, will make strategic choices and investments to enhance their teams, systems, and organizations, and will learn from and improve their marketing efforts along the way. In short, the leading professional design and environmental firms of tomorrow will “take the wheel” and drive their organizations toward success, rather than allowing markets or clients to instead “take them for a ride.”

Many professionals will continue to struggle in adapting to these concepts and paradigms for many reasons. The architecture, engineering and environmental consulting professions have a strained and tenuous legacy and history with marketing.

Many firms and leaders have experienced disappointment and failure in their own marketing or business development efforts. At the same time, most have enjoyed considerable success without an overt self or firm promotion. All together, these experiences and beliefs lead to a high level of skepticism among principals of architecture, engineering, or environmental consulting firms. However, the global economy, technological infrastructure, client markets, and professions themselves all point to change – significant change – and a much more uncertain future. In this context, assuming that what’s worked in the past is all that’s needed for the future is a risky and dangerous proposition, for today and tomorrow.



- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion



Finally, for leaders of design and environmental firms who agree with the premise and thesis of this paper, and who are ready to move beyond talk and into action, the following action agenda offers suggestions for action in key issue areas, to get you thinking and moving, and on the road to real success with your program in *Marketing: Made to Measure*.

## Action Agenda

### Paradigm:

Wake up! Get over it. Of course marketing works, especially good marketing! Marketing is much more than just sales.

Commit to better understanding of the marketing opportunity; commit to action, to getting better at marketing (personally, and in the firm).

### Perspective:

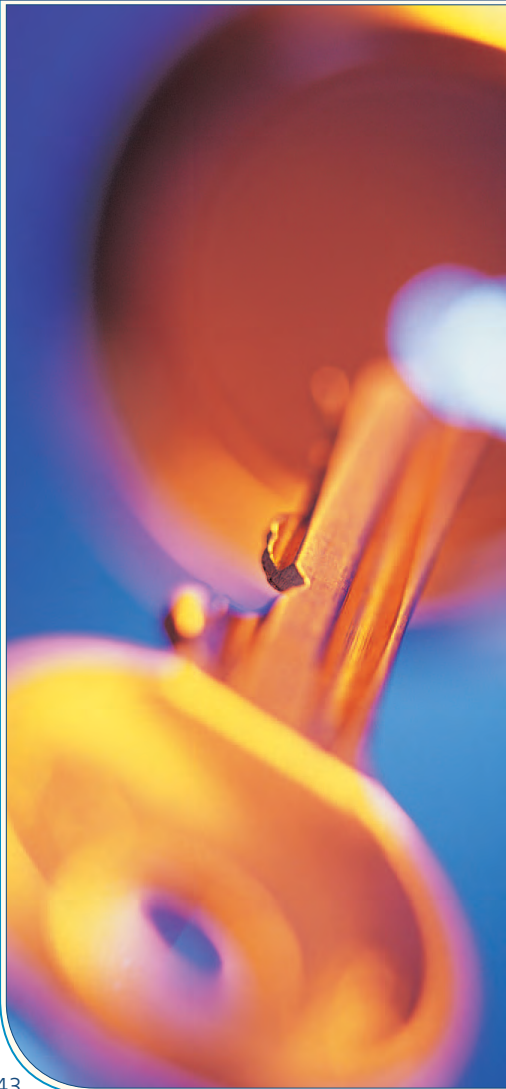
Open your eyes; open your mind. Broaden the perspective.

Think more strategically, more deliberately; consider the bigger picture, longer term perspective, and sustainable firm success.

### Strategic Business Planning:

Develop or update the firm's (or business unit's) strategic business plan, including vision, strategic thrust, and action plan. Consider, one – growth objectives, and two – market definition, at the enterprise level.

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion



### Strategic Marketing Framework:

Develop or update the firm's strategic marketing framework or plan. Make sure to include discussion, debate, and decisions (that align leadership) in the following:

**Positioning** – how the firm desires to be defined and seen in the marketplace (vis-à-vis competition).

**Marketing Mix** – the strategic choices the firm makes with respect to key issues areas, including services offered; pricing and contracting; channels and methods of distribution; promotional practices, themes, and programs; project and program delivery and process; and people, team, and talent.

### Organizational Structure (Firm):

Assess the firm's current organization structure model – what works and what doesn't? Consider adjustments or re-alignments that bring the client into sharper focus.

Consider the pros and cons of moving to a completely "market-based," or "market-facing," or "client-focused" structure; what would that look like, what would it achieve, what issues might it cause, how long would it take?

Develop strategy for improving the firm's organization and operation; outline goals and actions, and timetable for execution.

### Tactical Marketing Plan:

Develop or update tactical (and usually annual) marketing plans. Add in more details than in previous iterations. This should not be just a rough budget or growth estimate – but specific action-oriented goals, measures, and expected outcomes – for key areas of communications plan, activities/events plan, and business development plan(s).

Commit the firm to the process of annual marketing planning, and regular (monthly to quarterly), active management.

### Organizational Structure (Marketing Group):

Assess the current department, group, team, or individual. Again, what works and what doesn't? What are the opportunities, what else could or should the firm be doing?

How should the marketing function change, grow, or evolve, to meet the needs of the firm in 2010? In 2015?

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
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What other, alternative methods might the firm pursue to successfully achieve its marketing objectives through activities such as teaming, partnering and outsourcing?

Develop a strategy for improving the marketing group or team's organization; outline goals and actions, and timetable for execution.

#### Marketing Performance Metrics:

Outline and decide on the key performance metrics for measuring and stewarding marketing success. Include key indicators across the firm's business systems, cascading from enterprise strategy, to marketing strategy, tactics, and results. Develop a dashboard of measures and a reporting system to support regular management of marketing activities, efforts, and results.

#### Knowledge and Information Management:

Assess information systems shortcomings in the current organization. Consider especially the firm's accounting system and client relationship management (CRM) system and processes.

Define information system needs and develop a plan to create, enhance or better leverage the firm's information to improve the marketing program, client relationships, and opportunity management process.

#### Staff Training:

Evaluate needs and define opportunities to increase marketing or business development skills and acumen across the firm; consider ideas and methods to get more (ideally all) of the staff involved in the marketing effort.

Develop training to motivate and inspire the team; two ideas are Marketing 101 (2 hour session) for the whole firm, and BD 101 (8 hours) for the technical professional and project management staff.

#### Firm (Internal Communications):

Assess and improve the firm's communication efforts and effectiveness. Evaluate how the staff learns, understands, and espouses important business and marketing related concepts (e.g. value proposition); note the company's information sharing methods and success with market information/intelligence, firm marketing plans, progress and results against plans, project and firm wins, new initiatives and focal areas.

Create or update the management and (internal) marketing communications "system architecture;" decide what's needed and optimal for firm communications; establish goals, actions, and timetable for execution.

- >Introduction
- >Level 1: Strategic Business Goals
- >Level 2: Strategic Marketing Goals
- >Level 3: Tactical Marketing Goals
- >Level 4: Marketing Results Goals
- >Goal Setting
- >Other Ingredients
- >Conclusion

If you have questions or would like to be contacted, please feel free to send us a message.

> SEND MESSAGE

## Sources and References

1. ZweigWhite, 2008 Marketing Survey of Architecture, Engineering, Planning & Environmental Consulting Firms, ZweigWhite, 2008.
2. ZweigWhite, 2008 Training and Development Survey of Architecture, Engineering, Planning & Environmental Consulting Firms, ZweigWhite, 2008.



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