

MARKETING TO WIN

PSMJ's Guide To Developing And Improving
Marketing Materials For AEC Firms



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PREFACE

Throughout the AEC industry there have been numerous publications and newsletter articles on how to develop marketing and promotional materials. It used to be said that whenever a firm was slow in their work, they would design the office brochure. Today, firms are more sophisticated, leaving that task up to graphic design specialists and other talented people.

However, a brochure is much more than an exercise in graphic design, writing, and photography, as it must be based on solid research before pen touches paper, or images are thrown up in a template on the computer screen. Also, today the once dominant office brochure, a remnant of the old company catalog, is but one small cog in a firm's marketing and promotion machine.

There is now an arsenal of tools available, and it's up to each firm to determine how they will use them. Some have criticized the current technology and claim that the medium often overtakes the message, but it is important to remember the old adage that marketing tools take on the characteristics of the user. Consider the difference between a weapon in the hands of a terrorist, or in the hands of law enforcement.

This work examines the activities necessary to make sound judgements regarding the development, analysis, evaluation, and use of marketing, promotional, and presentation tools. It must begin with research, just as any project does, with reviews along the way, in order to come up with a successful promotional piece, or direct mailing campaign, or presentation.

The evaluations forms are spread throughout the text to offer a means of measuring the effectiveness of the pieces you've developed. These forms have been developed over the years based on client input and research, plus personal experience of the author.

We welcome any suggestions for objective improvements in the material presented in this work. We also welcome any of your material that you would like to have evaluated by us to compare with your own evaluations.

Our objective is to improve your professional image and performance, and to improve the effectiveness of all your marketing and promotional materials, proposals and presentations.

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INTRODUCTION

Marketing programming, client research, and the development of promotional materials, proposals and presentations to clients have come a long way since the early days of A/E marketing. In the early 70's, when marketing professional services was just getting started, the American Institute of Architects had just lifted the ban on advertising by professionals. Few firms fully understood how marketing worked, much less how to develop effective promotional materials. They acquired their projects mostly through tips and referrals, cold calls, and the good old boy network.

Firms first started to design fliers and brochures because they heard that their competitors were doing it, and they had better have one too. Architects began writing out their design philosophy, and proudly displayed pictures of their buildings. Engineers began explaining their technical process in detail, and showed pictures of their technicians in the field.

Firms had little experience working with marketing consultants, writers, or graphic designers, but they figured that if they could lay out a building or a bridge after all, they could certainly lay out a simple brochure. That supposition did not always translate well. However, this was acceptable as long as all the material looked and sounded the same – which it did for many years, as few firms really knew what to do in this new arena.

All that changed rapidly when a few pioneering people within A/E firms began hiring professional communications firms, with experienced writers and graphic designers to produce their brochures. They radically turned the perception of what professional promotional material should look like, upside down. These pieces really stood out from the crowd.

This trend went on to include promotional pieces developed for direct mail campaigns, special events pieces, and even advertising. As the AIA had lifted the ban on professional advertising, it became a new tool in the arsenal of creative firms, and was incredibly effective for some firms.

Perhaps the key player in making all this come about was the Society for Marketing Professional Services (SMPS), who held the first competition for promotional material in 1977. The subject was brochures. From more than 70 brochures submitted, six were chosen as winners in three categories. The second year's category for awards was newsletters, and out of 57 entries, 12 were chosen as winners.

In the following year, the author participated on a jury of three people, judging the third year's category for awards, which was slide presentations. He helped develop a set of criteria for judging the presentations, based on criteria used in the graphic arts, film, and other industry awards. The national A/E marketing community began to get its first comprehensive look at what was being done in promotional material around the country by A/E firms, as well as a guide to evaluate its effectiveness.

The awards exhibits gave firms a firsthand look at the latest "state-of-the-art" in promotional material. They indicated the level of sophistication to which clients were being exposed. They indicated the trends, and gave viewers the standards by which to judge their own in-house materials.

The awards program helped also to establish the credibility of marketing professionals within the A/E community. The annual coverage of the winning entries, written by the author and others, and published in the major national publications, really made the owners and principals of firms sit up and take notice of what was being done in the arena of promotion of their firm.

One of the most important trends that developed as a result of the communications awards program was that firms began to recognize the importance of basing their material on thorough research of their target markets. They conducted image surveys and made sure that client input and feedback were crucial to developing successful promotional pieces that were oriented to their client's concerns.

A lot of these techniques will be discussed and analyzed in detail throughout this book, and the numerous checklists and evaluation forms are all designed to reflect the experience of the past three decades by the author, SMPS, PSMJ Resources, and by the AEC community at large.

A lot has happened in those three decades. Competition to gain the attention of clients and position the firm in the marketplace has risen to a level equal to that of other project delivery activities within a firm. The coordination of marketing and project delivery is now one of the most critical in determining a firm's success or failure.

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CORPORATE COMMUNICATIONS

COMMUNICATION PROGRAM

COMMUNICATIONS PLAN

IMAGE OF PROMOTIONAL MATERIALS

CORPORATE IDENTITY PROGRAM

ADVERTISING, TRADE SHOWS, AND PUBLICITY

CORPORATE COMMUNICATIONS: Evaluation Form 1/2

PUBLIC RELATIONS AND PUBLICITY

CONDUCTING A SEMINAR

DIRECT MAIL PROGRAM

DATABASE FOR TRACKING LEADS

CORPORATE COMMUNICATIONS: Evaluation Form 2/2

Telemarketing Program Database

The process began nearly a decade ago for a midwestern firm. Rather than waiting for leads and contacts to develop traditionally, the firm invested in telemarketing database software - and in people with professional marketing skills to develop their own relationships with prospective clients over the phone. These client relationships developed over a period of years; so when a real need would surface, the firm was already well known.

There are database programs that track leads and contacts, such as RFPs Tracking Module, but this firm used Microsoft's ACT for the work. Deltek also has a client relationship management program. These programs allow you to stay in touch with a lot of people, yet a very small group can handle them.

The firm's entire marketing staff is tied into the database, as are all field marketers. The program can be constantly updated, and the information can be dovetailed with feedback from any personal contacts. Information put into the database can take many paths, including tracking, prompting, and even customizing the information to the point where it could create a customized "marketing plan" for each individual client.

Out of the 10,000 contacts in their database, they can narrow it down to a few dozen that have to be contacted for a specific action within the next 90 days, or sooner if need be. They can also automate mailings so that on any given day, letters to 350 clients can be sent out, for example. The program is also used to do market research surveys, as well as client satisfaction surveys. All information is documented in the system.

The firm feels that the program, initiated nearly a decade ago, has had a significant contribution to its overall growth. Once headquartered in the Midwest, they now have 15 regional offices, all self-managed within regional territories. They are all tied in with a central location, not where we would expect to find the corporate headquarters but where a tiny group of experienced and dedicated telemarketers run the program.

Evaluation Form: CORPORATE COMMUNICATIONS 2 / 2

Item / Description	Points / Item	Comments / Score	Points
PUBLIC RELATIONS: Max. (10) Pts. ea. (100)			
Public Relations Program:	External and internal program (10) - External only (7) - Internal only (3) - None (0)		
External Program:	Active program (10) - Moderately active program (5) - Minimal program (1) - None (0)		
Internal Program:	Active program (10) - Moderately active program (5) - Minimal program (1) - None (0)		
Print Media:	Coordinated program of materials (10) - Collection of materials (5) - Uncoordinated assortment (2)		
Mailing List Database:	Clients sorted by type (10) - General list (5) - Assembled as needed (2) - None (0)		
Photography:	Complete documentation (10) - Completed project only (5) - Construction progress only (2)		
Marketing tools:	Coordinated throughout (10) - Collection of materials (5) - Uncoordinated assortment (2)		
Advertising:	Active program (10) - Moderately active program (5) - Minimal program (1) - None (0)		
Community Relations:	Active program (10) - Moderately active program (5) - Minimal program (1) - None (0)		
Press Releases:	Active program (10) - Moderately active program (5) - Minimal program (1) - None (0)		
		TOTAL	
PUBLISHING PROGRAM: Max. 25 Pts. ea. (100)			
Press List:	All applicable publications, all areas (25) - Local areas only (10) - Assorted list (5) - No list (0)		
Publications:	Publications researched and read (25) - Don't study publication in depth (10) - Don't get it (0)		
Articles:	Provide good info (25) - Write to magazine's and reader's interest (15) - Write to tell our story (5)		
Reprints:	Order for direct mail campaign (25) - Photocopy article for occasional use (10) - File article only (5)		
		TOTAL	
SEMINAR PROGRAM: Max. 25 Pts. ea. (100)			
Subject of Seminar:	Based on research of client's needs (25) - Based on firm's expertise (15) - Arbitrary (5)		
Speakers:	Expert in client's subject area (25) - Knowledgeable in subject (15) - Somewhat knowledgeable (5)		
Program:	Relates to client's needs (25) - Provides good info (15) - Relates to firm's expertise only (5)		
Handout:	Premium info for client (25) - Package related to subject presented (15) - Standard firm material (5)		
		TOTAL	
DIRECT MAIL PROGRAM: Max. 15 Pts. ea. (100)			
Mailing List:	Response list, built by firm (15) - Compiled list from directories (10) - Rented lists (5)		
Test Mailings:	Always test (15) - Test sometimes (10) - Seldom test (5) - Never bother to test (0)		
Type Mailing:	Followup mailings (15) - Unsolicited mailings (10)		
Message:	Client-oriented information (15) - Firm-oriented information (5)		
Frequency:	Geared to marketing objectives (15) - Several times a year (10) - Whenever budget allows (5)		
Response Mechanism:	Separate from the mailing piece (15) - Built into the mailing piece (10) - None (0)		
Follow Up Plan:	Actively carried out ASAP (10) - Whenever time allows (5) - Don't follow up (0)		
		TOTAL	
Ratings:			
Superior: 90 - 100 Excellent: 80-90 Good: 70-80 Average: 60-70 Needs Work: 50-60 Start Over: 40-50			

Webinars (cont.)

However, the webinar must still be marketed, and the same amount of time and money must be spent in this area. Postcards or e-mail are vehicles used to announce the presentations several weeks, or even months, before their scheduled dates. To cut costs, multiple presentations can be featured on each mailing piece.

There is other technology available that allows viewers to access these webv-based presentations whenever and wherever they want, even months later. Questions can be then posted by viewers online for later response by the presenters. Many of these web-hosting presentation facilities charge on a per-site viewing basis. Since access to the site is electronic, e-mail addresses are used for registrations and all communications, and can be used by the firm to track viewers for effective future followup.

Seminar Case Studies:

An engineering firm positioned itself through its seminars as experts in a new market area. A flier was mailed to 3,000 companies. By the third seminar, each of which was attended by 20 people, the firm had been asked to submit seven proposals.

An interiors firm ran a seminar for facility planners on life-cycle planning. Announcements were mailed to 1,000 companies with a response card enclosed. The firm also ran radio ads for two weeks prior to the seminar, which greatly increased attendance.

An architectural firm generated so many leads through their pre-packaged seminar program that they are having trouble following them up. This has proven to be their best promotional vehicle.

A 60 person A/E/P firm with half of its contracts with small municipalities, designed a seminar to be held on a river tour boat. Each year they have 200 guests at the seminars, representing 30 municipalities. After the seminar, clients are called on, as the firm generates over a dozen leads at each seminar. The clients fill out an evaluation form, and make suggestions for next year's topics.

A seminar series was the best answer

An objective set forth in this 25-year old firm's marketing plan was to become more visible with a new image in the industry; to have their position strengthened in several market segments, as well as to increase repeat business. A seminar series became the best solution to meet these objectives.

Through their research they knew it would give them the best exposure; create a networking opportunity with potential clients at a reasonable cost; an ability to present themselves as innovators with experience, leaders in the industry, true problem solvers, and most importantly - a business-oriented company.

A mailing list was compiled of present clients, past clients, new contacts from their "hot" leads list; facilities planners, consultants, developers, leasing agents, contractors, and architects.

An in-depth analysis was performed to determine which topics would benefit the design and real estate community the most.

Speakers were required to satisfy several objectives through their topics, and provide useful information to solve problems for those attendees with immediate and future projects. For consultants, it became a great opportunity to understand the concerns and needs of facilities planners for their projects. It provided an opportunity for all attendees to network; and finally, an opportunity for the speaker to gain new contacts and exposure.

For four consecutive months invitations were mailed with return R.S.V.P. cards. The return cards became an important tool providing a means for maintaining a current mailing list, adding new participants, and an opportunity to identify concerns of attendees.

Some of the immediate results of the seminar were: positive enthusiasm for the program, additions to the mailing list, new leads, consultants' interests in joint ventures, requests for proposals, less cold calling, and some previous obstacles to client contact were totally eliminated.