

DOMAIN 5: Promotional Activity – Promotional Activity involved developing, implementing, and coordinating efforts to promote the firm through advertising, public relations activities, and media outreach. Advertising is a marketing tool that uses purchased space to deliver a message to a targeted audience. Professional service firms have only been able to legally advertise since 1978. A successful communications program, including publicity and public relations as part of the marketing plan, will reap many rewards both internally and externally. Publicity based on the same goals and objectives as the marketing plan will also enhance the firm's image.

Knowledge Areas

- Messages for individual marketers
- In-house newsletters
- Press releases
- Media Kits
- Media plans
- Readership, demographics, other pertinent information
- Direct mail
- Advertising campaigns
- Press kits
- Brochures

Skill Set

- Develop goals and objectives that augment the marketing plan to enhance the firm's image and to reach the target audience
- Research media that will reach your target audience
- Create a media plan that is based on timelines and budget
- Develop criteria so to that advertising firms can respond to an SOQ from your firm
- Initiate contact and develop relationships with key media

Discussion Questions

- Has your firm launched a successful ad campaign?
- What research methods are used by your firm to identify, qualify and target clients and media?
- Does your firm regularly send out press releases/announcements?
- What is your most effective form of advertising?
- Does your firm utilize your website as an effective marketing tool? If so, how

DOMAIN 5: Summary of Discussion

Ad Campaigns

- An attendee mentioned her company created 3 similar looking advertisements and placed this in a few targeted publications such as the Blue Ridge Journal.
- We also discussed radio advertising and how NPR, channel 89.1, is the station most of our decision-making clients listen to. Breakell has had a lot of success from this and clients even mention their ad.
- We got on the topic of company name changes and all of the changes in advertising and materials such as business cards, stationary, marketing materials, etc. We talked about HSMM's joining with AECOM and how it has taken several years to completely transfer to the new AECOM name. Brenda with Cole & Russell talked about their name change to CR Architecture & Design. We also discussed adding new branches and how all materials need to be updated for this as well.

Press Releases/Announcements

- We discussed how some firms have a devoted employee for PR, to handle press releases and announcements of new contracts/awards.
- Breakell talked about how they also sell ideas internally to their own employees to bridge the gap between in-office employees and field staff.
- Anderson & Associates, Inc. uses an external bi-monthly newsletter to announce this information, highlight clients, and mention employee achievements. A&A also has an intranet with a "faces" page where employee can view each other's photos and personal information keeping everyone more closely linked.

DOMAIN 6: Information, Resource, and Organizational Management – Focuses on the professional services marketer as one who inspires superior organizational performance through effective leadership in dealing with all members of the marketer's professional services firm.

Knowledge Areas

- Management and motivational techniques
- Records management systems for project, personnel, consultant, proposal, and/or visual information
- Computerized database management systems
- Staff training techniques
- Individual and group dynamics
- Leadership and team-building principles
- Evaluation techniques for design/production efficiency and quality control
- Promoting and rewarding high-quality team performance and effective client service
- Techniques for resource management and costs/benefit analysis

Skill Set

- Manage/supervise the activities of marketing and support staff
- Coordinate marketing efforts and provide a communications link across departments, disciplines, and/or branch offices
- Develop and maintain systems to extract, categorize, and retrieve information related to consultants, personnel, projects, prior proposals, boilerplate, visuals, mailing lists, and promotional items
- Develop and maintain an internal communications program to facilitate information sharing within the firm; inform and involve the principals and technical staff regarding marketing efforts
- Conduct marketing-related workshops/training for the principals and technical staff
- Attend professional development activities
- Monitor information, resource, and organizational expenditures to ensure consistency with budget
- Recruit and keep star performers
- Build high-performance teams linked to key client groups
- Refine the design/production process to improve efficiency and quality control

Discussion Questions

- Does your firm hold performance reviews for all of its employees? If so, what type of criteria is used?
- Does your firm have a mission/vision statement? If so are all employees aware of what they are?
- Is your company mission statement enforced?
- How does your firm effectively communicate between departments?
- What type of internal marketing techniques does your firm utilize?

DOMAIN 6: Summary of Discussion

Performance Reviews

- Most agreed that performance reviews with feedback are very helpful.
- One attendee mentioned that her company reviews notes from previous reviews and old information is brought up, even though it may not be feasible anymore.
- Most hold performance reviews annually, some on the anniversary month of hiring.
- One attendee felt that her company didn't take reviews as seriously, only handing out a standard questionnaire to each employee, whether they are marketing staff or engineering. She felt that each person should be reviewed based on their role. As marketing staff, she wanted to have measurable goals put in place for the following year to achieve.

Mission/Vision Statement

- We talked about how most vision statements are very similar and that employees are generally aware of what it is but can't quote it.
- Most of our firms have framed mission statements in our offices.
- Breakell had an interesting mission statement including "environmental stewardship." We thought this was a great way to differentiate.

Communication Between Departments

- We discussed how some offices have meetings weekly or monthly so departments can share information.
- Marketing meetings are typically separate from department meetings.

Internal Marketing Techniques

- We discussed using email to announce successes throughout the company.
- Anderson & Associates, Inc. uses their intranet to make these announcements daily.
- Another firm mentioned that sharepoint is commonly used for this and they have sites developed for each department.
- We discussed internal newsletters and how they are hard to keep up with unless there is a devoted person to this. We agreed that HR would be good for this.



Brown Bag Event

April 28, 2009, Noon – 1pm

DOMAIN 5: PROMOTIONAL ACTIVITY

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- and to reach the target audience
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- • initiate contact and develop relationships with key media

Suggested Resources

- Creating an Effective Brochure for the 21st Century. Rena Frankle, 1997. #WS-353.
- Writing for Design Professionals. #0393730263
- American Graphic Design Awards, No. 3. #WS-533

DOMAIN 6: INFORMATION, RESOURCE, AND ORGANIZATIONAL MANAGEMENT

This domain focuses on the professional services marketer as one who inspires superior organizational performance through effective leadership in dealing with all members of the marketer's professional services firm. Filling this role effectively requires acquiring a keen insight into the personalities of the firm's staff and principals, and learning what it takes to bring about effective group dynamics leading to a shared commitment to excellent client-centered service.

Knowledge Areas

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- • records management systems for project, personnel, consultant, proposal, and/or visual information
- • computerized database management systems
- • staff training techniques
- • individual and group dynamics
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Skill Set

- • manage/supervise the activities of marketing and support staff
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Brown Bag Event-

Discussion Questions

April 28, 2009, Noon – 1pm

DOMAIN 5: PROMOTIONAL ACTIVITY

1. Describe a step-by-step plan necessary to develop a successful ad campaign.
2. List and briefly describe a few of the basic research methods to identify, qualify and target clients and media.
3. List and briefly describe the essential elements of an effective promotion plan.
4. List and briefly describe the essential criteria of a press release.
5. List and briefly describe the process of creating a website, collateral material, and publicity.
6. List and briefly describe the categories of advertising.

DOMAIN 6: INFORMATION, RESOURCE, AND ORGANIZATIONAL MANAGEMENT

1. Describe some marketing criteria that might be included in performance reviews for all staff members of a professional services firm.
2. List and briefly describe the essential elements of an enforceable contract and list some important typical contract provisions.
3. Briefly describe the importance of company mission and vision statements in providing the inspirational foundation for a shared culture of success.
4. Describe a few of the elements of the internal marketing-related process commonly referred to as “rainmaking.”
5. List and briefly describe a few internal marketing techniques.

Promotional Activity

BY JULIE WAGGONER, CPSM, ASSOC. AIA, AND BERNIE SIBEN, CPSM

Editor's Note: This column looks at each of the six Domains of Marketing Practice. In the last issue, we looked at SOQs and Proposals. In this one, Promotional Activity is examined.

The knowledge and skill sets of Domain 5, Promotional Activity, run the gamut from graphic design and awards program submissions, to trade shows, to business etiquette. In short, Domain 5 includes everything that puts a face on your firm and every activity or item that touches a potential client. Much of promotion involves “hard-copy” materials such as brochures, postcards, displays, and other promotional items; it also involves “in-person” interaction with potential clients and with colleagues.

However, in recent years, technology has begun to affect the face of promotion, taking it to the realm of the internet. Promotional activity has begun to make a noticeable move from hard copy to digital communications: to an increased understanding of the significant marketing value of Web sites, as well as e-mail newsletters. Personal interaction also has begun to be supplemented by internet communications, such as business/professional networking sites. More firms are finding that electronic promotions can be a valuable addition to their usual promotional activities and printed promotional materials.

Web Sites

There is a wealth of excellent information about Web sites, both in print and on the Web. In this article, we'll touch briefly on the basics of an effective Web site.

- Your Web site should be updated frequently (once per quarter at an absolute minimum; once per month or more is a good target). Include updated information on projects, awards, clients, community service.
- Your contact information and location should be readily accessible, without clicking through multiple mystery pages.

- The site should offer potential clients enough information about your firm to encourage them to contact you, but not enough that they—or your competitors—can simply download it and use it themselves.
- On the other hand, consider the advantages and disadvantages of blogs, white papers, and other forms of information sharing. Advantages include positioning your firm as an expert on a subject; disadvantages include putting your information out there for competitors to snag.
- Consider the advantages and disadvantages of having an e-mail in addition to a phone contact on the site: On the upside, e-mail is an easy and popular form of contact; on the downside, it might leave you open to Webcrawler spam.
- As in print media, keep words to a minimum and photos to a maximum; they're more likely to keep the attention of a potential client.
- If you have tech-savvy personnel in house to keep your Web site updated, great. If not, weigh the benefits of having a user-friendly Web site interface, such as Adobe Contribute, which can allow in-house personnel who have minimal Web knowledge to update pages at a moment's notice.

E-mail Promotions

Not all firms will find e-mail promotional activities, such as an e-newsletter, to be worthwhile. However, many members of the SMPS community give a hearty thumbs-up to the effectiveness of e-newsletters. In order to determine whether or not your firm would benefit from an e-newsletter, take the same approach you would for any promotional effort:

- What are you offering in your communication that is useful to potential clients and will propel them to action—or will keep your name foremost in their minds for future projects?

- What is your estimated cost for design, implementation, and maintenance?
- How much time is involved including graphic design, technological design, and administrative and coordination tasks.
- What is your anticipated return/end benefit for your investment?

Carolyn Bligh, of Bligh Graphics, says she has seen strong e-newsletter results for her clients as well as her own firm. She emphasizes that the content must be valuable to the potential client, however, or it will be viewed simply as spam. “It is a commitment to communicate something of value to your target audience. Define that message, and develop the design and copy to best communicate it.”

Linda Lamb, marketing coordinator for Wood+Partners Inc., cautions against sending out monthly e-newsletters, as they can be more frequent than recipients might want; a quarterly newsletter is ideal for their firm.

E-newsletters also support a firm’s commitment to being green by not using papers and inks. **Caroline K. Slaten, CPSM**, business development manager for Randall Paulson Architects, reports that her firm won a sustainable mixed-use project as a direct result of her firm’s e-newsletter featuring an on-the-boards LEED project. A potential client read the article, contacted the firm’s principal about a mixed-use sustainable project, and her firm was awarded that project.

Many respondents are enthusiastic about the current e-newsletter software/supports, such as Constant Contact, which allow the sending firm to track reader click-throughs in real time and to analyze results so that future newsletters can be tailored to suit readers’ preferences. This kind of “instant ROI” is not usually available through other types of promotional activities.

Promotional skills that are useful in face-to-face and phone contact continue to be useful in internet networking, such as good interpersonal and communication skills. **Shally Steckerl**, founder of JobMachine, Inc., and a business strategist, advises personal contact in addition to e-contact: “Pick up the phone and call, too. This way, they are more likely to forward your requests, and ask you for requests, making your network stronger.”

With these new tools in our promotional toolkits, marketers have even more ways to reach out and connect with potential clients. **m**

About the Authors



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Try a New Approach: Teamwork Taught by Fools

BY JULIE WAGGONER, CPSM, ASSOC. AIA, AND EDITED BY BERNIE SIBEN, CPSM

Editor's Note: This six-part series has looked at each of the six Domains of Practice of Professional Services Marketing. This article addresses Information, Resource, and Organizational Management.

Marketing colleagues, it's time to come clean: I have another life. I'm a member of "The Villa Idiots," a professional comedy improvisation troupe based in Northampton, MA. We are known for getting onstage in front of an audience and doing something that—according to many verified statistics—terrifies the average human being: We make up a performance on the spot, based upon ideas tossed to us impromptu by audience members. We do this in front of, oh, say, 300 people at a time. That's 300 live, opinionated, judgmental people.

Often called "comedy without a net," improvisation is the performance style made famous by television's "Who's Line Is It, Anyway?" The basic tenets of successful improv include being able to embrace risk, to accept the possibility of failure, and to have faith in one's own creativity.

For those of us in the architecture or engineering professions, the lessons of improv can be embarrassingly pertinent. Although working in a creative field involves risk, perhaps you've discovered that those who are drawn to architecture and engineering have certain personal characteristics that can make the innocent phrase "accept the possibility of failure" sound ominously like "re-enact core childhood trauma."

And thus, Domain Six is an area in which to practice comedy improv lessons. Learning about risk onstage can encourage your firm members to trust each other and work as a team. Learning about status roles, and about give-and-take in comedy scenes, can teach your firm's next generation about leadership and management. Learning to offer good ideas onstage can teach your team about good communication, resource sharing, and group dynamics.

Here's a quick overview of the basic ideas embedded in comedy improvisation and how they can benefit your firm.

"Just Say Yes!" ...to Everything

Say "yes" to the good, the bad, the ugly, and the utterly absurd—accept it all as fodder and work with it.

Saying "no" is akin to denying reality. Therapists, 12-step programs, the Dalai Lama have been telling us for years that denial doesn't work in life. In improv, saying "no" to your scene partner's ideas will kill creativity and stifle progress...the scene will die an ugly and boring death, onstage.

It's like a brainstorming session: Remember, there are no bad ideas, at least not at first blush. In improv, we practice saying, "Yes, and..." rather than, "No, but..." A quick improv exercise involves two people imagining that they are designing something—a house, for example. If the first person says, "Let's design a house made of paper," the second person must say, "Yes!" and build on that idea: "Yes, and the house will be rigid, light, and collapsible, so that it can be moved in event of a natural disaster." Designers who participate in this exercise are often fascinated to find out how often they say "no" to colleagues' suggestions—and how interesting the outcome can be when they say "yes" and build on an idea.

In your firm, take the time to say "yes"—at least every now and then—to the ideas that seem wacky or strange. Say "yes" in order to facilitate team building and the ability to work cooperatively.

"If You're Going to Fail, Fail BIG!"

This maxim should *not* apply to structural design, but to ego. Go ahead: Risk falling smack dab on your face. Put your whole heart and gut into whatever you do. In improv, we say if you can't sing onstage, sing loudly and sell it! Maybe you can sing, and you just

never tried. And if you're lousy, so what? It's much more fun to watch someone who cannot sing really *belting* it out than it is to watch a performer squirm and try to crawl offstage. And here is the surprise gift in the whole deal: It is more fun to *be* the person belting it out.

Listen to Your Partner

In improv, we learn to pay attention to the environment and to the partners in our scenes. As performers, we risk becoming addicted to being The Absolute Funniest Person Onstage, and we forget to cooperate with our scene partners. We become intoxicated, inside our own minds, with the next funny thing we're going to say. We wait impatiently for the other person to finish talking, and then we utter our fabulous line. And it falls flat. Why? Because the scene has moved on while we were listening to our noisy little brain.

Listening onstage is like listening at work. Of course your ideas are great—and your co-worker's ideas might be great, too. To listen is to be a better collaborator, co-worker, designer, team member.

Make Good Offers

This is improvisation jargon for being imaginative and for contributing good ideas to scenes. It means being generous—by giving your scene partner creative openings, offering rich concepts, and making fresh opportunities for scene and character development. And sometimes it simply means shutting up and letting your partner shine. The best scenes to watch from the audience are those in which the scene partners work together, listen to each other, and generously offer each other their best.

In your firm, offering each other your best ideas and encouraging each other to shine can promote teamwork and good organizational morale.

Go Ahead: Try It in Domain Six

Comedy improvisation—like life and like work—can be frightening because it involves taking risks in front of others. But improv, of course, is pure play. If you don't like the milk from that previously mentioned ear-residing cow, you can pretend to choke and die a heroic death onstage, and reappear in the next scene with a Wile E. Coyote grin.

Work and life are far scarier, because they are *real*. But comedy improv is a good place to practice all those skills you'll need. Practice saying "yes," practice being willing to risk, practice making your partners look good. Practice teamwork, practice leadership, practice communication.

This year, try a new approach to Domain Six in your firm: Hire your local improv comedy troupe for a workshop. You may be surprised by what you learn—and by how much fun you have. **m**

About the Series' Authors



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