

# Virtual Business Development Planning

A/E/C firms that put the client at the heart of their organization experience an increase in customer lifetime value and a reduction in client turnover. Elevate Marketing Advisors works with firms to develop a client-centric model where market sectors are purposely defined by client type. The *type* of project and how you *execute* project work are different than how you *pursue the client* and *win* the work.

Together, Elevate works with your team to create detailed client pursuit strategies to grow market share with both new and existing clients. This approach fosters priority-based client management and business development by encouraging teamwork through inclusivity of all services and geographies.

## BUSINESS DEVELOPMENT PLANNING PROGRAM OUTLINE

### PLANNING & PREPARATION (Elevate Team)

- Review Strategic Plan Goals
- Develop Firm-Specific BD Plan Worksheet
- Develop Firm-Specific Client Capture Plan Tool
- Coordinate Planning Sessions

### Pre-Session Webinar

(All Team Members - 1.25 hours)

- Navigating Market Shifts Through a Strategic BD Approach

### Session 1

All Team Members (1.5 hours)

- Welcome/Introductions/Process
- Review of Corporate Goals/Plan
- Revenue Goals for the Firm and for each Market Sector
- Review of Overall BD Plan

### INDIVIDUAL MARKET SECTOR PLANS

Your Elevate facilitator meets with each market sector BD team individually to work through the plan. Each market sector BD planning team is comprised of the market sector leaders, directors, client managers, and business developers across all service lines and geographies.

### Session 2

(1.5 hours for each market sector)

- SWOT
- Perception Analysis
- Ideal Client Profile

*Homework: Work with team to complete section by Session 3.*

### Session 3

(1.5 hours for each market sector)

- Client Personas
- Measurable Goals

*Homework: Work with team to complete section by Session 4.*

### ABOUT ELEVATE MARKETING ADVISORS

Elevate Marketing Advisors develops marketing and business development campaigns to invigorate your brand, differentiate your firm, and drive business to your bottom line so you stay focused on design and delivery of your discipline.

We are driven to help people and firms realize their beyond through relationship, advocacy, and an elevated client experience. We do this through a daily commitment to our guiding principles:

- Embrace Authenticity
- Reject Mediocrity
- Invest in Relationships
- Deliver with Intention
- Have Fun and Kick Ass!



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### Session 4

(1.5 hours. for each market sector)

- Core Clients
- Key Clients

*Homework: Work with team to Complete Section by Session 5*

### Session 5

(1.5 hours. for each market sector)

- Partners/Strategic Alliances
- Association/Organizational Involvement
- Growing the Team Section

*Homework: Work with team to complete Draft Plan by (date to be determined).*

Your Elevate facilitator will be available in between sessions for assistance and coaching.

### PLAN REVIEW AND APPROVALS

Elevate reviews draft plans and makes recommendations. Final Drafts are then sent to firm leadership for approval.

### Session 6 – Group Presentations of Plans

*(Depending on the number of market sectors – approximately 20 minutes per sector plus 15 minutes for introductions & close)*

### Session 7 – Client Capture Planning

*All Team Members (1.5 hours)*

Client Capture Plan Training using a real priority 1 core client.

### ACCOUNTABILITY

Accountability is achieved through disciplined planning, rigorous measurement and evaluation, and continuous improvements in performance and strategy. It links cause and effect of investments to diagnose performance problems in a timely way and supports fact-based decisions on how to increase return on investment (ROI).

Additionally, we use return on objective (ROO) to measure initiatives and strategies where analytics are more challenging (or impossible) to obtain. Elevate offers the following accountability services to ensure your team adjusts in real time due to market sector shifts or other factors while still meeting their goals.

- Development of tracking tools and reports for BD that incorporate finance, operations, BD, CRM, and more
- Financial Tracking Report
- Priority 1 Core Client Tracking Spreadsheet with all Priority 1 Core Clients
- Opportunity Spreadsheet or CRM Opportunity Report development and refinement
- Quarterly or Bi-Monthly Virtual Market Sector Progress Updates with each Market Sector Team
- Monthly or Bi-Weekly Virtual BD Meetings with all Market Sector Leaders, Client Managers, BD, Marketing and Principals
- BD Meeting Process with a focused agenda (no round robin)
- Leadership of BD Meetings and Training of future leaders
- BD Meeting Spreadsheet Report
- Monthly Market Sector Leader Virtual Coaching
- Quarterly BD training (live or virtual) to help your market sectors reach their goals

### OTHER SERVICES

#### Training

According to recent research, training is the #1 benefit requested by employees of A/E/C firms. Training, however, continues to make the Top 5 list as the 3rd biggest challenge firm leaders face when managing their companies. Elevate has a host of training programs for leaders, doer-sellers, and



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We have a new Business Development mindset that is creating success. The knowledge we've received of the industry and understanding of how things work with being purposeful and having a plan of action has helped transform Tamarack Grove Engineering. It's changed the course of our company and given us a new sense of purpose, vision, and action.”

**BRIAN SIELAFF, PE**

CEO

Tamarack Grove Engineering

marketers that is designed specifically for A/E/C firms and their staffs. Elevate works with firms to identify training programs that meets their needs. Attendees of our training sessions walk away with strategies and techniques that empower them to grow in their careers as they help grow their firms. All Elevate in-house training is customized with you to incorporate your firm's structure, naming conventions, challenges, and existing best practices. We also provide you with the native presentations, templates, and recordings to use in future on boarding and training.

### Marketing Plan Development

"If you don't know where you're going, you won't know which road to take." Without planning and a sound strategy, how can you know where you are going or what you need to do to get there? Elevate's goal is to create a road map that will get you to where you want to be.

Using data obtained during the BD planning process and marketing audit, Elevate leads the development of a comprehensive marketing plan and budget based on specific, measurable, achievable, realistic, and time-bound (SMART) goals and objectives. And, we identify the resources necessary to successfully promote and grow your firm.

The work you do during BD planning to identify internal strengths and weaknesses and external opportunities and threats (SWOT), your target markets, target audiences, and client personas (along with the marketing audit) provide the framework for the marketing plan. The next step is to identify methods for reaching clients/prospects, identify core positioning and messaging for each market sector, and position external experts/thought leaders. This also includes creating brand awareness for new geographic regions.

The success of a marketing plan is in the action plan! This is where the rubber meets the road. With a well thought out action plan, it is clear who is going to do what, by when, in order to get where you want to go.

Elevate creates detailed marketing plans for each market sector. Those plans are rolled up into a Corporate Marketing Plan so you can see how each sector's marketing strategy contributes to your revenue goals, how spending is allocated across the markets, how activities and content generated at the market sector level benefit the firm overall, and how the corporate brand benefits all markets. Also incorporated into the Corporate Marketing Plan is an overall marketing strategy to achieve the corporate goals identified in the BD Plan.

### Marketing Plan Implementation

Elevate can assist with the implementation of your Marketing Plan. Examples of specific tactics and programs include:

#### Content Development that Drives Business to Your Bottom Line

Building specialized content that showcases and positions subject matter experts to gain visibility with targeted audiences is a strategic way to connect with your current and prospective clients.

Thought leadership differentiates your firm while demonstrating technical expertise and presents your team as innovators, problem solvers, influencers, and educators. When delivered consistently and constructed with purpose and focus, a content development program – where your firm is perceived as the expert – can drive business to your bottom line. Thought leadership elevates your market presence, helps attract and retain the best talent in your discipline, opens doors for teaming opportunities, and even allows you to charge higher rates.

Through an annual Content Development Program, Elevate will interview your technical team members to "ghost write" articles each month with accompanying social media posts. Articles can also be pitched to industry publications. We can also develop a monthly Social Media calendar with 2-3 posts per week on your various channels.



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Our company had planned an on-site 1 ½ day training with Elevate Marketing Advisors in late March. Due to the COVID-19 pandemic we decided, with some hesitation, to pivot and host the training in a series of 2-hour Zoom meetings. Jen & her team did an amazing job of providing content and guidance and kept us on track to finalize BD plans in just 6 short weeks. The work environment changed drastically overnight and working through the BD planning series assisted in new strategies to sell and stay connected with prospects and clients.”

**JASON ROBERTSON**  
Marketing Director  
CRB

**ERIC DANIELSON**  
Director of BD  
CRB

### Marketing Campaigns

Marketing campaigns are organized, strategized efforts to promote a specific firm goal, such as raising awareness for a firm expansion or acquisition, general brand awareness, or both. They typically aim to reach clients in a variety of ways and involve a combination of media including but not limited to email, print advertising, pay-per-click, and social media.

Marketing campaigns don't include all marketing efforts for a brand. In fact, the word "campaign" is defined as "a connected series of operations designed to bring about a particular result." Great marketing campaigns follow a consistent theme and promote a single or focused idea or goal. For example, every Nike advertisement you see or hear on the way to work probably isn't part of a campaign. But, if you see a Nike billboard, scroll past a Nike sponsored Instagram post, and receive a Nike email all promoting the same product ... you've definitely witnessed a marketing campaign.

Campaigns are focused, acute marketing efforts to reach a singular goal. Your marketing message will vary depending on whether your campaign audience is in the awareness, consideration, or decision stage. It's important to note that a marketing campaign can include collateral for people in various stages of their journey. For example, while your campaign might target current customers, it might also bring brand awareness to new clients.

Marketing campaigns are determined through the Marketing Plan, and further defined by the BD Plan. Elevate can help identify and execute marketing campaigns that reach BD and Marketing goals.



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The impact we've received from strategy and training put a fire of energy and organization into our company, changing the way we do business that has impacted the culture and bottom line. From organizational structure to employee development, business development planning to coaching, we've realized the next level in our firm.”

**TAMARA BAKER**  
Founding Principal  
*Baker Design-Build*

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Jen Newman did outstanding work engaging, coaching, and working with our team to help them develop strategy and techniques to further enhance their business development skills. Her approach helped empower our team members to work across traditional boundaries sometimes present within professional firms while building teams to collectively pursue common firm goals.” –

**DEAN MCCLURE**  
President  
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