Preparing Doer-Sellers for a Virtual Environment

Elevate Marketing Advisors' Doer-Seller Business Development training program has been re-designed for the virtual environment and is geared to principals, doer-sellers, marketers, and non-technical business developers alike. This is the most comprehensive Doer-Seller Training Program in the built environment, taught by a team of Business Development and Marketing veterans with decades of A/E/C-specific experience converting doers into successful doer-sellers.

This program – customized to incorporate your firm's structure, naming conventions, challenges, and existing best practices – guides participants through the stages of business development with tactics for our current virtual world that are easily translated to in-person development for the future. Through a series of live virtual training sessions and workshops, participants develop actual plans to secure new or enhance existing client relationships.

Oh, and did we mention, we make this program exciting and fun?

The programs below include all virtual BD training sessions offered by Elevate marketing Advisors. Our team will work with you to select – and curate – the right program to meet your specific needs and goals.

BUSINESS DEVELOPMENT STRATEGIES FROM A PHYSICAL DISTANCE

In this interactive session, attendees are grouped to discuss new BD strategies to employ from a physical distance, and then are split into Zoom breakout rooms where each group develops three new strategies and an implementation plan to connect with clients from a physical distance. *1.5 PDHs*

MAXIMIZING CLIENT RELATIONSHIPS FROM BEYOND THE DESK & FROM A PHYSICAL DISTANCE

Clients want to work with people they like, know, and trust. Whether it's a project manager who never leaves their desk, or a senior leader who engages clients in BD every day, or through our current reality of physical distance, this session will help attendees create micro-habits for maximizing relationships. *1 PDH*

STAND OUT DURING PHYSICAL DISTANCING WITH SOCIAL & PERSONAL STRATEGIES

Online meetings, new coworkers, and tight quarters are the new normal. With increased stresses in our everyday world, how can we ensure marketing and BD initiatives are relevant, timely, and help us stand out from the competition? How we respond during these times will either bring our clients delight or become an unfortunate internal meme. This session presents an empathy-mapping exercise focused on how to stay connected with clients during various stages of a relationship with goals to be present, be relevant, and stay in it together! 2 PDHs

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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CREATING A CHAMPIONSHIP VIRTUAL INTERVIEW TEAM

When it comes to creating a championship interview team, the primary goal is connection – not perfection. But, connecting virtually is challenging (and many clients report they prefer the virtual medium to in-person interviews). Winning presentation teams employ a structured and strategic process that conveys technical acumen and client-specific content while creating moments of insight into the personalities and unique characteristics of team members. But they must also consider the nuances of presenting in a virtual environment – lighting, projection, backgrounds, engagement, and more.

Using a real pursuit opportunity, attendees work in groups to create a win strategy, storyboard, visuals for the virtual environment, choreography for seamless transitions, and learn specific techniques to help them connect to clients. Teams then compete in mock presentations and Q&A with a mock client panel culminating in a project award to the championship team. This program takes place over the course of four, two-hour sessions with teams working on assignments in between. Instructors schedule a rehearsal with each team after the last session, prior to presentations. (Be sure to ask Elevate about our project-specific interview coaching!) *10-12 PDHs*

VIRTUAL BD LIVE: ROCK THE CLIENT MEETING

BD Live is just that…a live demonstration with your real-life client to illustrate the BD process in the virtual environment. It's critical we still conduct client meetings, even if we're not meeting in person. However, this approach takes preparation. Prior to this program, Elevate works with your firm to identify a client and conduct a LIVE exploratory interview to explore the nuances of BD through various scenarios and role playing. Afterward, attendees form teams and conduct mock interviews putting into practice what they've learned. *2 PDHs*

THE BUSINESS OF BUSINESS DEVELOPMENT

As marketers and business developers, we constantly repeat the mantra, "Business Development is Everyone's Business!" Then we hope every staff member will magically step up and help bring work in the door. We even trust the principals and PMs to make all those BD calls they promised. Sound familiar? So how do you get people excited about doing BD? How do you make sure they're prepared? What skills do YOU need to develop business or to train the technical staff in BD skills? In this session, we share a model BD program structure including who participates, proven process, and motivation techniques. Following, we discuss real-life experiences as BD — both the hits and the misses — and moderate a Q&A for attendees. *1.5 PDHs*

NAVIGATING MARKET SHIFTS WITH A STRATEGIC BUSINESS DEVELOPMENT APPROACH

This session guides participants through the development and implementation of your strategic business development playbook driven by a priority-based client management system that enables you to convert more leads into wins. *1.5 PDHs*

BUSINESS DEVELOPMENT PLANNING

Do you have a BD plan that goes beyond revenue goals to include action items and accountability measures to ensure your firm realizes the goals? Creating and implementing an effective BD plan is possible – when you have the right guidance and the right process to take a plan on paper to a plan in motion. Elevate can help you develop, implement, and monitor your firm's BD strategy so it's proactive and purposeful, and pivots with shifting markets. Our BD planning process is specifically designed to help you achieve sustainable growth and success to ensure your firm is resilient in any economic cycle. We start with a successful and proven structure that is customized to address your unique challenges and capitalize on your advantages and differentiators. Training is conducted virtually over 6 to 12 weeks in 2-hour sessions (weekly or biweekly) with each market sector. Attendees leave the program with a clear understanding of and the details necessary to build a realistic strategy to realize their goals. The program concludes with market sector plan presentations through a BD Rally. *12 PDHs*

"Elevate Marketing Advisors provided our firm invaluable guidance when preparing for our first virtual interview. I'm confident in saying that their support elevated our team to finish 1st overall competing against three Top 16 and two Top 68 ENR Top 500 Design Firms."

JAMES C. BISHOFF, PE
Principal/Co-Founder
J2 Engineering

"I appreciated Jen's style and all her helpful information. The activities and role playing were great pragmatic lessons that will stick with me for the rest of my career. I have noticed that through the real-life implementation of these pointers, my clients have responded favorably and have complimented BRPH and me, personally, about how delightful it is to work with us."

LOGAN GROBER, AIA, NCARB, LEED AP BD+C
Architect
BRPH

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BUSINESS DEVELOPMENT MEETINGS

Accountability is crucial for success, particularly when developing business. This session guides your firm to create, implement, and conduct a monthly one-hour BD meeting as an integral part of your team's accountability plan. During the course, we train your in-house leader to run this virtual meeting efficiently and effectively. We provide the tools they'll need – including agendas and opportunity reports – to ensure the meeting stays on track. And, we instill the importance of your BD team coming prepared with the necessary intelligence and relevant information to make the meeting successful. *1.5 PDHs*

CLIENT CAPTURE PLANNING WORKSHOP

Give your firm the competitive advantage to win more work by taking a strategic, focused approach to pre-positioning with your top priority clients and prospects. Elevate works with you to create client capture plans focused on the needs and nuances of your firm and your target clients. Using a real client, this interactive session walks participants through the capture planning process and incorporates examples of proven strategies to establish long-term client relationships. *2 PDHs*

GETTING THE MOST OUT OF VIRTUAL MEETINGS

Our world has changed quickly. Working remotely with teleconferences is now the norm for the majority of the A/E/C workplace. How do we make the most of this new reality? How do we make teleconferencing more successful? How do we reduce multi-tasking during the meeting? This webinar explores 12 tips to make the most of virtual meetings to help you stay connected with your clients and your staff. *1 PDH*

BRANDING, MARKETING & BD: WHAT'S THE DIFFERENCE?

Learn the difference between branding, marketing, and BD to gain a better understanding of how each contribute to positioning and winning work. *1 PDH*

POWER POSITIONING

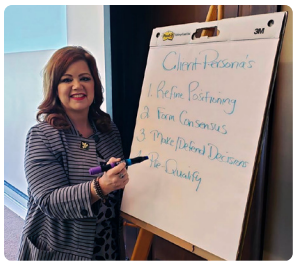
Power positioning involves presenting yourself to the right person, at the right time and place, with the right message. It's a continuous process of discovering new ways to influence how clients and prospects see you. This session takes participants through various methods of positioning and how to create a plan to best position them and their firm. *1 PDH*

GO/NO-GO PROCESS AND THE IMPACT TO YOUR BOTTOM LINE

New research from the Society for Marketing Professional Services (SMPS) indicates the average A/E/C firm hit rate – measured most commonly as the total number of proposals submitted to the total number of projects won – falls within the 37-44% range, depending upon discipline. Therefore, it's never been more imperative to establish and implement a Go/No-Go process to help your business thrive. Pursuits are a huge expense for your firm (including marketing and technical time, printing, shortlist interviews, etc.) so it's critical to be strategic when deciding to pursue a project. This session helps attendees identify key criteria to address during a Go/No-Go evaluation and the value the Go/No-Go process has to your firm's bottom line. *1 PDH*

CONNECTING THROUGH CLIENT PERSONAS

Client personas are fictional representations of your target audience – developed using data you've collected from research and analytics – that provide insight into what your clients think, how they act, and why they select their external partners. This session explains how to create client personas and explores the value and insight they bring to your firm. Discussion topics include how personas inform positioning, consensus building, making and defending decisions, and setting pre-qualification criteria; developing marketing content that aligns with client needs and priorities; understanding client issues and creating solutions to solve them; aligning your organization around a client-centric vision; and more. *1.5 PDHs*



"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

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CLIENT EMPATHY MAPPING

Client empathy mapping is a process that helps you get inside your client's mind to better understand how they engage with your organization and your staff at any given point during your relationship. Empathy mapping enables you to gain valuable insights and determine actionable items that can help differentiate you from your competition, build deeper relationships, and create relevant content that connects with your clients for pursuits, messaging, and marketing. This session takes you through the empathy mapping process with an existing client or client group to give you better understanding of their pain points and needs so you can develop strategies to connect. *2 PDHs*

CREATING PEAK MOMENTS IN YOUR CLIENT EXPERIENCE

All moments are not created equal. Our experiences are mostly forgettable and occasionally remarkable. According to psychologists, we ignore or forget most of what occurs in any experience and focus instead on a few particular moments – the peaks, pits, and transitions. Research suggests that our most positive moments share certain traits: elevation, insight, pride, and connection. During this session, we'll explore how to create peak moments throughout your client's experience, from first engagement to project delivery and beyond. *2 PDHs*

CREATING CONVERSATIONS THAT COUNT

Communication is critical to professional success. The way you communicate reflects who you are and influences your ability to build relationships with those around you. Whether you're interacting with co-workers or meeting with a client, improving your ability to communicate effectively increases your probability for success. This session helps attendees recognize their personal communication style and develop tactics for working with people of different styles. *2 PDHs*

DEVELOPING YOUR WHY TO DEVELOP YOUR PERSONAL BRAND

Your brand is your reputation; what you're known for and how people experience you. A positive personal brand encompasses key traits that distinguish who you are and highlight your best qualities like: problem solver, connector, leader, designer, or mentor. Often, your traits include characteristics you've worked hard to develop, matter most to you, or you've sustained over time. During this session, participants develop a personal brand statement and learn to articulate that statement clearly in meetings, on resumes, through social media, and more to create memorable experiences for those they encounter. *2 PDHs*

PERSUASIVE, POWERFUL, PURSUIT STRATEGY

Once the client relationship is established, you are in the know about the upcoming project, and have a thumbs up from your Go/No-Go process, it's time to develop your win strategy to guide the proposal stage of the selection process! Most proposals start with a cover letter or executive summary. Your competition typically pens their first sentence with "thank you for the opportunity to present…" BORING! Your cover letter is the first impression the selection committee has of your proposal. And some clients say a well-written cover letter that explains how you're going to solve the client's issues and successfully deliver the project can often get your team to the shortlist without them every turning another page. But, prior to crafting the cover letter, you must lay out your strategy, conduct research, identify differentiators, and define your win theme. In this program, participants learn to develop a proposal strategy and create killer cover letters using a real RFP along with additional client intel and a client capture plan. Working in teams and competing against peers, attendees create and deliver their pursuit strategy and cover letter that balances delivery of key information with a persuasive, well-substantiated pitch, demonstrating a clear understanding of the client's needs and your firm's solutions for the project. *2-4 PDHs*

MARKET RESEARCH 101

Research is critical to understanding the markets in which a firm operates and the challenges faced by owners/clients that drive decisions. In this session, participants explore how to perform primary and secondary research to gain a better understanding of markets and clients. *1 PDH*

"Having an objective, experienced, and enthusiastic person like Jen lead this training was invaluable. We covered communication styles, client capture planning, and client experience. Throughout all of this was the common thread of relationships. I think what resonated most for me was the idea that we're all just people, and the reminder to approach each relationship with respect and a desire to understand and really listen (not just hear)."

DARYL BRAY, AIA
COO
SGA Design Group

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THE FRUGAL MARKETER: HOW TO SURVIVE (EVEN THRIVE!) IN THE "NEW NORMAL"

How do most A/E/C firms respond during a down economy? (Hint, it's the last thing they should be doing!) When the economy slows, many firms cut back on marketing, which they view as just an overhead expense – often decreasing marketing budgets and staff, or both. These firms are more concerned with the "now" than the possible long-term ramifications of cutting back. Marketing- savvy companies use downturns as a unique opportunity to out-market their competition and position themselves for economic recovery. In this session, participants learn tactics to successfully market their firms, keep BD programs active, and cut costs, not corners, to get the best bang for the buck. *1 PDHs*

HOW MANY CLIENT TOUCHES DOES IT TAKE TO WIN A PROJECT?

During a typical client pursuit, there might be over 100 unique client interactions — direct and indirect — and it may take years to realize your return on investment. The old adage, it takes money to make money, has never been more true. This session provides answers to common questions like, "What activity really matters?" and "What client touch points really make a difference?" through exploration and discussion of industry best practices. *1 PDH*

HOW TO INFUSE A MARKETING CULTURE IN YOUR FIRM

How many times have you heard, "That's not my job, that's marketing's job!" In reality, successfully marketing starts internally with a well-developed marketing culture where every firm employee is engaged at some level. In this session, we share how successful firms have aligned, motivated, and empowered staff at all levels to get involved — and get ahead — in marketing their firms. *1 PDH*

WHAT'S TRENDING NOW? IDEAS & STRATEGIES FOR PREPARING FOR THE FUTURE

What starts as a trend can quickly become the baseline: BIM in 2007, social media in 2004, Design/Build in 1990, or 'desktop' computers in 1984. What's next for the A/E/C industry and how is your firm positioned to embrace and adopt new strategies? In this session, we discuss trends affecting the future of A/E/C and how attendees can use start conversations to help their firms prepare. *1.5 PDHs*

CLIENT INTELLIGENCE: GATHERING THE RIGHT INFORMATION BEFORE & AFTER A PROJECT PURSUIT

Have you ever been stumped losing a job that you "knew" you're firm was going to win? Or, questioned how your competition had the insight on an upcoming project? During this session, we discuss strategies and processes you can put in place to gather and capitalize on project intelligence before AND after a project pursuit? Topics include: the importance of debriefing after every project pursuit – win or lose; information you need to make a solid Go/No-Go decision: what are the ramifications of NOT pursing a project with a client; and how to interpret the information you gain from a potential or existing client and use that information to win. *1.5 PDHs*

MAKING ENE OF ROI AND ROO: HOW TO CALCULATE A RETURN ON YOUR MARKETING INVESTMENT

Research indicates that 54% of firms set their marketing budgets based solely on performance/historical data from the prior year. And, research indicates that up to 50% of marketing dollars are wasted annually with many firms not using any type of Return on Investment (ROI) methodology. Successful A/E/C firms often measure both direct-value returns (ROI) and indirect value returns or Return on Objective (ROO) to calculate their successes. This session explores the differences in ROI (hit-rates, new revenues, web metrics, trade show leads) as well as ROO (reputation, client satisfaction, goodwill, positioning) to help firms make sense of their returns on investment strategy. *1.5 PDHs*

Elevate Marketing Advisors provides your firm with the following tools for your resource library:

- *Raw format templates to edit & brand*
- *Original PowerPoint presentations*
- *PDF of all presentations*
- *Zoom recordings of all sessions*

"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

Meet Your Virtual Training Team

JEN NEWMAN, FSMPS, CPSM
Jen draws from her 20+ years of A/E/C industry experience to help firms grow their people and profits. As Elevate's official "Energizer Bunny", Jen understands that the best results come from engagement during training and draws from real-life examples and storytelling to convey tactics and principles that allow for immediate and actionable skills to be put to use. And, she does all of this while creating an environment that is supportive and just plain fun!

DOUG PARKER, FSMPS, CPSM
As a closet introvert, Doug often uses himself as an example to technical teams that BD skills can be successfully learned and put to practice. He draws from his 20+ years of experience in professional services firm marketing and management to coach others to realize their personal style and strengths to develop relationships and build business.

CARLA THOMPSON, FSMPS, CPSM
Carla is an accomplished trainer and coach, having delivered hundreds of seminars, workshops, and presentations over her nearly 40-year career in the A/E/C industry. This industry veteran has a unique ability to build confidence and draw the best of her training participants.

JOY GUINN, FSMPS CPSM
Throughout her career, Joy has developed and implemented marketing and BD strategies to support corporate goals for growth. She has crafted and delivered more than 100 presentations for a variety of audiences and has led and actively participated in strategic planning, capture planning, and training for firms ranging from 25 to more than 14,000 employees.

SARAH KINARD
Sarah is a strategic visionary with nearly 20 years of experience in professional services firm strategy, marketing, training, and implementation. A past VP of Global Marketing & Strategy, she is known as a change agent, frequently hired by firms to create a strategy rooted in research, business practice, and scale resulting in their unique growth plan.

"The support we gained from our coaching sessions from Elevate Marketing Advisors helped us seamlessly transition from in person presentations to successful GoToMeetings presentations. The advice and recommendations gave us the tools to take our virtual presentations to the next level. Their coaching played an important part in helping us win the contract. Our team highly recommends Elevate Marketing Advisors."

TUSHAR AWAR, PE
Principal/Vice President
Gorove Slade

"Jen is very passionate about coaching and mentoring new business developers. Over this series, the participants were engaged and motivated during each session. Jen delivered the programming in a way that wasn't intimidating and provided for a fun atmosphere. They received actual tips, homework assignments, and participated in an incentive contest that encouraged them to put their skills to use right away. In the BD LIVE session, our clients were also impressed that we invested time and resources in developing our team members."

LINDSAY DIVEN, CPSM
Former Principal
BRPH