



# **Seller-Doer to Indispensable**

## The Key to Beating a Downturn

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# Your Presenter

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# AGENDA

## 1

### Path to Indispensable

- What is Business Development?
- BD for Everyone
- Features, Benefits, Differentiators
- Indispensable
- Project Manager as Seller-Doer

## 2

### Client Management

- The third component of business development
- Existing Clients
- Cross-Selling
- Client Touches
- Career-Client Development
- Client Selection
- Go-No/Go Process

## 3

### Roles & Responsibilities

# Program Objectives

(1.0 AIA LU)

1. At the conclusion of this program attendees will be able to understand their roles and responsibilities in supporting and growing new and additional work for their firms and recognize the importance of developing and integrating business development into their portfolio of career skills and knowledge.
2. Attendees will examine the definitions and examples of features, benefits and differentiators and distinguish the importance and use of these firm attributes when working with existing clients or marketing new clients.
3. After completing this program attendees will be able to explore and plan the actions that they may take to improve their skills in client management and growing new and additional work for their firms.
4. During this workshop attendees will be introduced to two tools to help them evaluate and determine if new client opportunities or new project opportunities are appropriate for their firms. The client selection tool focuses on the high-risk of inexperienced clients and the Go-No/Go tool focuses on non-starter issues that should be assessed first, before further completion of the overall Go-No/Go evaluation.



# 1 Path to Indispensable

# What is Business Development?

## Marketing

Pursuit of new clients



### Opportunity

- Look for new prospects
- Share your expertise
- Keep in touch with your clients
- ID potential clients
- ID potential projects

Prepare a proposal

## Sales

Pursuit of new projects

- Additional work on existing projects
- Cross-selling
- Referrals
- Manage proposals
- Negotiate Contract



### Project

# BD for Everyone

## Business Development

### Culture

- Marketing Strategy
- Know features vs. benefits
- Know value they create for client
- Earn client's trust

### Responsibilities

- Everyone knows their role in retaining/acquiring clients
- Client Management
- Accountability

### Training

- Client Selection
- Strict Go No/Go process
- Selling benefits
- Articulating differentiators

# Features and Benefits



## **Features** – A list of facts about your firm

- Your markets/industries
- Staff experience, knowledge, credentials
- Award-winning projects
- Location(s), Size
- Niche firm to full-service firm
- DB, IPD, P3, CMAR experts
- Uniquely innovative
- LEED experts, Grant writing
- Types of problems you solve
- Use of technology



# Features and Benefits



**Benefits** – outcomes that are valuable to your clients - sell your benefits

- Save client's time and money
- Improve client's productivity
- Award-winning design
- Enhance client's brand
- Create sought-after places to work, live, experience the arts, play football . . .
- Energy efficiency
- LEED approval
- Public approval
- Low long-term maintenance costs
- Solved client's problem

# Differentiators – Dig Deep



**Differentiator** - A characteristic of your firm that separates you from key competitors and gives you a perceived advantage in the eyes of your clients

- You know client's markets well and what they aspire to
- Multiple ways you helped your clients be successful
- You know how to recognize client needs and link it to what you offer
- You specialize in a specific market and have a notable depth of projects and people
- A broad range of specialties – you are a one stop shop
- You sell the highest-quality, best-in-class design (not low price)
- You offer the best quality for the price (quality-to-price-ratio)
- Relevant innovation
- Your track record – completion schedules/final cost
- Your clients are your advocates

Your differentiators must be important to your clients

# Indispensable



## Indispensable

- Reputation in the industry
- Leading expert in profession
- Provide insight and perspective
- Synthesize and explain complex industry issues/needs



## Thinks like the client

- Understands client's industry/market
- Clients seek them out
- Clients perceive value in their contributions to projects

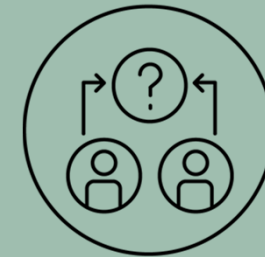
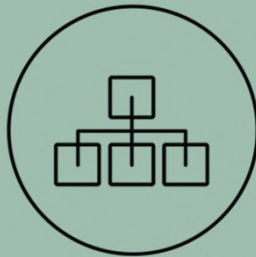


## Firm Leadership

- Builds long-term, sustainable business relationships with clients
- Leads business development strategy/efforts
- Client's "go-to" contact outside project team
- Ensure projects meet client organization's expectations

# Project Manager as Seller-Doer

Your path to indispensable



## Service Delivery Leader

- Understands and meets client expectations
- Primary client contact
- Ensures that the project team adds value to the project

## Client Management Leader

- Responsive
- Reliable
- **Manages problems well**
- Client wants to talk to you not a principal
- Seeks client feedback

# Project Manager as Seller-Doer

Your path to indispensable



## PM as Seller-Doer

- Works to retain clients
- Seeks additional work from clients on existing projects
- Aware of client's up-coming projects
- Understand the client's decision-making process

## PM as Seller

- Knows firm's features/benefits
- Cross-Sells firm
- Supports/prepares proposals
- Participates in contract negotiations
- Wins more work



# Client Management

# 2

# Client Management



**Marketing**



**Sales**



**Client  
Management**

## **The third part of BD**

- Broaden your relationship
- Look for opportunities
  - to provide additional services on existing projects
  - for others in your firm to do work for your clients
- Obtain formal feedback
- Confirm satisfaction in writing
- Stay in touch
- Identify those client that see you as their “go to” firm

# Client Management - Existing Clients

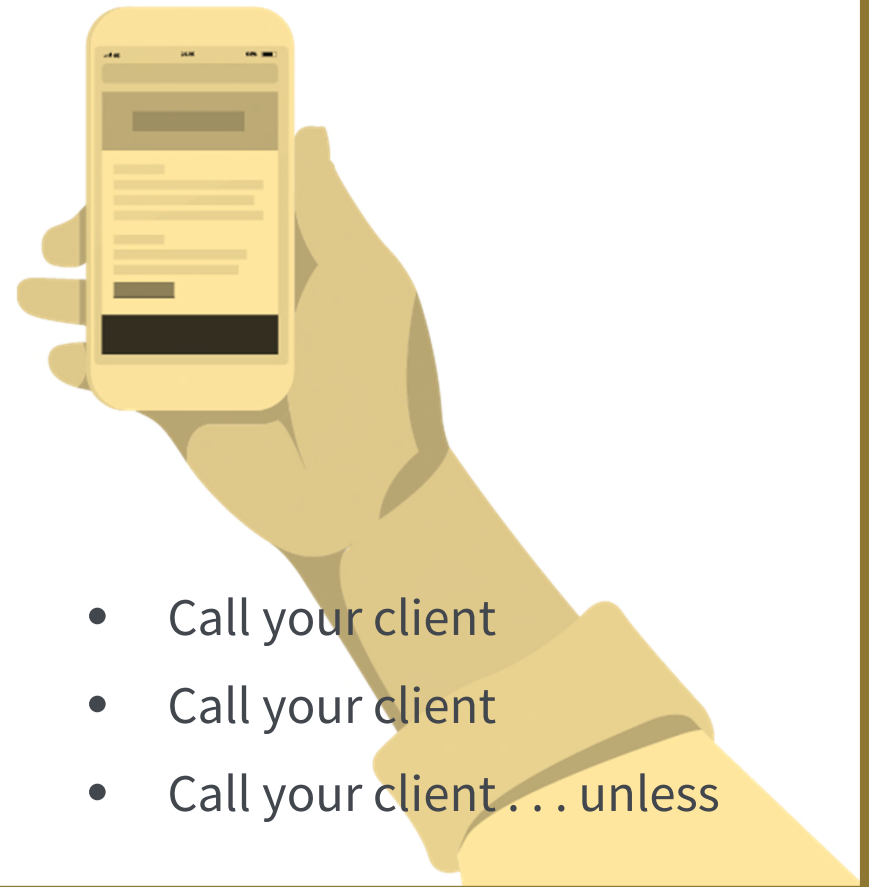
## Current Work – Existing client

- Plan - execution of project
- Meet/exceed client expectations
- Pro-actively communicate with client on project status, potential issues/concerns
- Communicate & manage risks
- Identify additional services



Position current project for next project (ABC)

## Pick-up the phone



- Call your client
- Call your client
- Call your client . . . unless



# Cross-Selling



**What else can you do  
for your existing  
clients?**

Identify and provide additional services that support the needs of an existing client

**New service to existing client**

**ALSO**

**Existing/new service to same organization but new client rep**

- They know your firm
- Firm made investment in “learning how they work”
- Less expensive to procure work from existing client than chasing new one
- Enhances value client gets from firm

# On-going marketing efforts

## Relationships

- Client Touches
- Participate in your client's associations – share your knowledge
- Information about materials, regulations, changes or impacts to client's market – helpful to the client
- Info about your firm's newly completed project

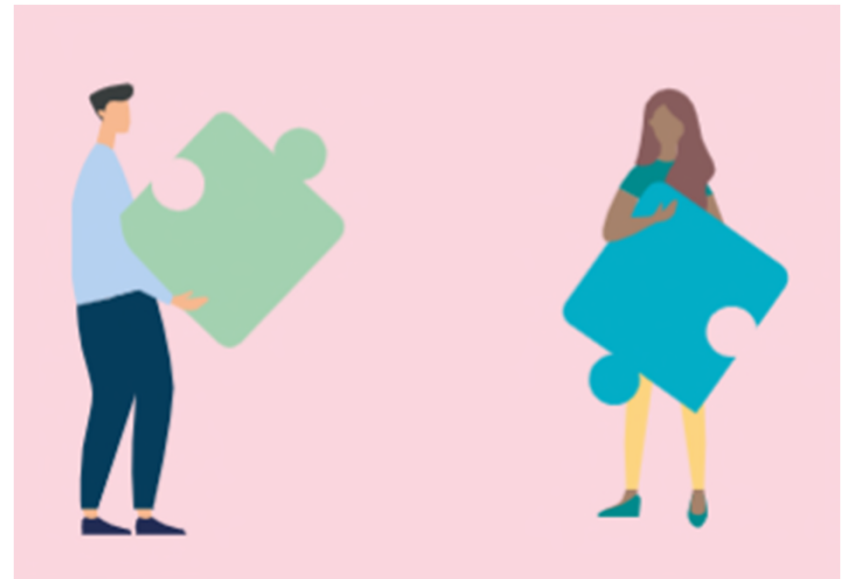


- Think like your client
- LinkedIn connections
- Firm Social Media
- Hand-written thank you notes
- Company Newsletters/Blogs
- Firm Awards
- Connect on common interest

# On-going marketing efforts

## Career-Client Development

- Co-author white papers
- Contribute to a firm blog
- Association presentations
- Offer helpful learning seminars to your clients on new technology, approach, regulation, etc.



- Volunteer - industry association
- Training-Web presentations/facilitating webinars
- Charity/Fundraising events
- Develop your public-speaking skills (Toastmasters)

# New Opportunities

## Client Selection Process

### New Clients - are they a good fit for your firm?

#### Client Intake Process

- Experience – client inexperience is biggest risk driver in client selection process
- Claims & Litigation History
- Financial Condition
- Payment History
- Contractor Selection Process



# New Opportunities

## Client Selection Process – Client Experience



1. Has your client completed similar projects?
2. Have they completed projects of this scope?
3. Do they have a project representative?
4. Are there other key stakeholders?
5. Is the client familiar with our work?
6. Did the client prepare the proposal for this project?
7. Did you know about this project before receiving the RFP/RFQ?

# New Opportunities

## Go-No/Go Process

### **New Project** – is it a good fit for your firm?

#### **Is the RFP worth your time?**

- Proposals require an investment of overhead resources
- Consistent approach for all RFPs
- Differentiate a more successful opportunity from any opportunity
- Replace “gut feeling” with objective criteria



**Available for you:**  
AXA XL Contract Guide  
Exhibit 16 – Go/No-Go Project Risk  
Assessment Tool



# New Opportunities

## Go-No/Go Process - Handout

**Must pass first level -  
yes answers required**

1. Is the project really open to qualified bidders?
2. Is the project free of conflicts of interest if we win the work?
3. Are the client's contractual terms and conditions acceptable to us?
4. Can we win with an innovative approach?
5. Can we commit the required team to prepare the proposal and execute the work without compromising our commitments to existing teams?





# Roles & Responsibilities





# Roles and Responsibilities

## Everyone Markets

- Appropriate marketing goals based on experience and utilization goals
- Routine marketing meetings – bi-weekly, monthly – review goals, prospects, RFPs, proposals, wins

## Organizationally

- full time marketers (32% of firms)\*
- Only part-time staff - support proposals, presentations etc.
- Specific partner or principal (42% of firms)\*
- Hybrid approach

## BD Costs - % of Net Revenue

- Median 2.5-3.5%\*
- With BD Staff 4.9% - 5.5%\*
- Without BD staff 2.6%-3.4%\*



# Example: Roles and Responsibilities

Role	Existing Client Revenue & Services	New Prospects	Proposal Performance	New Clients
Jr. PM	Client-specific goals		Project-related	
PM	Client-specific goals	Local/ regionally	New proposals for current clients	New client in existing client organization
Sr. PM	Client-specific goals	Nationally	New service for existing clients and existing services for new client	New client in existing industry or practice area
Principals/ Partners	Client-specific goals	Nationally	Strategic proposals new/existing clients	Strategic new client in existing or new industry



# Questions



# We're here to help





**Thank you**





**Know You Can**