behind business development

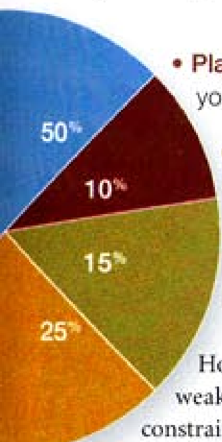
A step-by-step guide to creating a consistent flow of work

By Kelly Fehr and Kenneth Caldwell

Business development is about putting yourself in your clients' shoes and communicating with them about what they are interested in. It can help your firm survive the recession and lead to a consistent flow of work. To succeed requires taking an active interest in what clients want and discovering how they intend to accomplish their goals.

1. Know where you want to go (without getting stuck in planning): First, identify the overarching strategies. For example, you might want to develop a private college portfolio, open an office in Los Angeles, or expand your senior living practice. Keep planning simple—limit it to one sheet of paper. Seek the minimum amount of information necessary to begin talking with prospective clients. Understand just enough about near- and long-term demand, competitors, and current events to initiate an intelligent conversation.

One way to avoid getting stuck in planning is through budgeting. Consider allocating time and money according to the following proportions:



- **Planning** (deciding where you want to go)
- **Developing clients and leads** (discovering affinities)
- **Proposing and presenting**
- **Engaging with the client**

Honestly analyze your strengths, weaknesses, opportunities, and constraints. How does what you want to do fit with your firm's vision, mission, and culture? Understand the relationship between what you can do and what the market demands.

Next, list approximately 10 clients—organizations, companies, or institutions (not individuals)—who might need what you offer. Describe your relationship and rate the degree of closeness on a scale from 0 to 10—0 means they know nothing about you, 10 means they are like family.

2. Discover affinities and make initial contact. The next step is to figure out who the decision-makers and influential people are within each organization. Call consultants you know who have worked with your target clients. Find out if the client is doing work you are interested in and who they've been working with. Research the prospective clients' business goals and recent projects via the Internet. Identify the most senior decision-makers you are likely to be able to reach—usually a vice president. If feasible, get a referral, but if the process is taking too long, don't wait.

Once it's time to make contact, make sure you're in the right frame of mind—it's not helpful to think, "They don't know me. They don't want to talk to me." If you've identified interests in common, if you are a design professional that offers a service that a client is interested in, then the person will probably want to talk to you. Make sure you know what you hope to accomplish in the call. Write down key points, and be prepared to leave a message.

Initiating contact by both telephone and e-mail allows people to respond in their preferred mode. The e-mail provides context and credibility, making a response to the phone message more likely. The phone message lets the recipient know that the e-mail is not spam. The message should be no more than two to three sentences. State who you are, what you want, and what value there might be in talking. Ask if this is the right person to be contacting.

When you reach your contact by phone, be curious and attentive. Ask questions that will help you understand whether and how you might help. Direct questions are more likely to get definitive responses: "I understand you have just completed a master plan. Do you expect to seek outside consultants for the projects defined in that plan?" When you hear what the client needs, don't automatically start offering solutions—continue to inquire and listen. Remember, you are still trying to discover whether a prospective client is a good fit; don't ask if the client has a project or try to sell your firm. The goal is to find affinities between your organizations as well as between individuals.

At a certain point in the conversation, you will know whether a face-to-face meeting is merited. If so, suggest it. Ask where and when the client prefers. The client's place of business might be the right venue, but sometimes your office or a project site might be better.

3. Meet face to face and explore options. The person with the most relevant expertise should attend the meeting. If that person isn't a "people person," enlist a coach. Consider sending two people—there's more of a chance to connect. The goal of the meeting is to confirm common interests and begin to position for future work.

When you have learned enough, begin to engage in problem solving and project forming. At this point, usually your goal is not to obtain a specific commission, but to become a trusted advisor. You may or may not receive a commission, but if you established a positive connection, stay in touch. (For tips on this, see *Contract* January 2007, p. 120-121.)

4. Engage. Continue the practice of exploring client concerns. Spend time with clients beyond day to day project demands. Present together at a conference or host a job site tour. Talk to your clients about their aspirations as well as what keeps them up at night. Design professionals who are successful at forging new relationships tend to be outgoing, extroverted, conceptual thinkers. They are comfortable with "what ifs." Many architects struggle to make the connection between the people and the objects they create. Deliberately striving to discover and communicate common interests helps close this gap.

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