THE ZWEIG LETTER

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MARKETING SUPPLEMENT
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April 28, 2014, Issue 1053

Meetings, calls, emails, texts...

No method of communication is perfect, but each is best for certain situations, Mark Zweig writes.

So what is the best way to communicate? There is no best way. Different people and different situations require different communication methods.

Mark Zweig

EDITORIAL

As leaders and managers of A/E/P or environmental firms, we all share one thing: lack of time.

We work in project-oriented businesses. Clients and team members need our attention. And problems back at the office have to be dealt with as well. As some of the best people in our firms, we get overloaded. Our lack of time means we have to use the time we have wisely. But that may be in conflict with our generally preferred methods of communication.

Let's take the case of "Bob," a busy principal in decent-sized, specialized consulting firm. He's very involved in his projects and he travels a lot. He also holds a corporate post where several other departments report to him. Bob considers himself a good communicator. He *is* a good communicator. People like him – he's not full of bull – and he has a good clear head on his shoulders. Problem is he prefers face-to-face communication. He's a good looking guy, sincere, and effective at business development. He knows face-to-face communication is his strong point. But he doesn't have time for all the meetings he "needs" to have. So things may get stalled off until he can schedule a face-to-face. And that's not good for him or whatever issue needs to be resolved.

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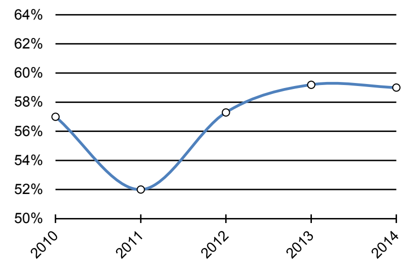
TRENDLINES

Lower charge



Chargeability – which indicates the percentage of total labor costs that are chargeable against billable projects – has decreased slightly this year, according to the 2014 Financial Performance Survey.

The median chargeability rate has dropped to 59 percent, from 59.2 percent last year. This is after being on a steady incline in the past two years, increasing from 57.3 percent in 2012, and from a five-year low of 52 percent in 2011.

– *Margot Suydam, Director, Research*

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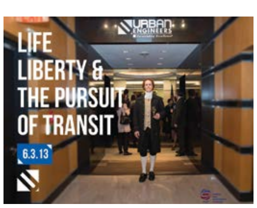
WHAT'S WORKING



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A/E BUSINESS NEWS

LEED IN SPACE: The U.S. Green Building Council announced that 3 billion square feet of green construction space has earned LEED certification around the globe.

"This milestone is the result of leaders across our industry making the business and environmental case for healthy, sustainable buildings," said Rick Fedrizzi, president, CEO and founding chair, USGBC. "More than 4.3 million people live and work in LEED buildings. As our numbers continue to gain momentum, the impact is significant – jobs are created, revenue is generated and wellbeing is prioritized – proving every day that LEED works."

Green construction has grown massively over a short period of time: McGraw-Hill estimates that it will comprise half of U.S. construction and be worth up to $248 billion by 2016. LEED is the most widely recognized and used green building program across the globe, with more than 1.7 million square feet of commercial building space LEED certified each day in more than 140 countries and territories.

In the U.S. alone, buildings account for 41 percent of energy use, 73 percent of electricity consumption and 38 percent of all CO_2 emissions. Globally, buildings use 40 percent of raw materials, or 3 billion tons annually. LEED is designed to minimize the adverse effects of constructing, operating and maintaining buildings, while maximizing sustainability and health-related features. By encouraging the careful sourcing and selection of building materials, reducing energy use and waste, conserving water and ensuring a healthy and safe indoor environment, LEED is being used to optimize building projects in new construction, retrofits and ongoing building operations across the commercial and residential sectors, as well as neighborhood developments.

Some of the most well-known LEED buildings include The World Bank in Washington, D.C.; the Fifth Avenue Tiffany & Co., the Time Life Building and the Empire State Building in New York, N.Y.; the Merchandise Mart in Chicago; and Taipei 101, one of the tallest buildings in the world, in Taipei, Taiwan.

CONSTRUCTION STARTS UP IN MARCH: Reed Construction Data announced that the value of March construction starts, excluding residential contracts, surged 46.9 percent to $23.7 billion after sinking 14.2 percent in February. This was the highest value for starts since November 2013.

However, starts were up a modest 0.4 percent from March 2013. The March starts data are an indication that construction is bouncing back from the harsh winter weather, but still has a way to go.

- Commercial starts doubled in March (+109.9 percent) after plunging 35.9 percent the previous month. Year-to-date, commercial starts were down 24.1 percent.
- First quarter lodging (hotel and motel) starts were at their second highest level since 2009.
- Industrial (manufacturing) building starts, despite a more than five times increase over an unusually low February number, were still down 41.3 percent on a year-to-date basis.
- Institutional building starts more than doubled in March (+111.9 percent). On a year-to-date basis, these starts were up 98.2 percent
- Heavy engineering (non-building) starts strengthened 19.2 percent in March. Year-to-date starts were up 15.7 percent from the same period in 2013.

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He'd be well-served to use more phone calls or even emails when on the road to resolve critical problems. It's not the best way to communicate, perhaps, for him or anyone else, but it still may be better than doing nothing until a meeting can be held. It would increase his effectiveness to do more with the tools he *can* use 24 hours a day, no matter where he happens to be.

Then there's the case of "Sue." She's a busy firm manager herself, who is also highly billable. She, too, is very competent and highly organized. But she is the opposite of "Bob" in that she avoids all face-to-face meetings and phone calls. Instead, she wants to *only* communicate via email. She will send an email to someone on the other side of the room when she could simply speak to them. She's an introvert. Plus, she likes the ability to refer back to all instructions she's given and decisions she's made. Email is therefore her preferred form of communication. As a result, her relationships suffer. No one really knows her – she stays in her office, close to her computer – so they don't trust her. Not good because the lack of trust is hurting her effectiveness.

So what is the best way to communicate? There is no best way. Different people and different situations require different communication methods. Sometimes a meeting *is* necessary because of trust issues or to go over things that can't be dealt with through email or some other way. Sometimes a call will suffice if a meeting can't be held for any number of reasons. And sometimes an email may be the best way to get all the facts out in a logical and clear manner and to provide some sort of audit trail. Finally, sometimes texting is an effective way to communicate. When you have little to say but want to get it out quietly and privately, a text message can be useful. We text in BoD meetings oftentimes instead of passing notes around like we used to in the olden days.

All four communication methods are effective when used properly and *at the right time*. If your managers are struggling to keep up, or are having problems with their relationships inside and out of the company, this is one area to investigate.

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STRUCTURE

Balancing vision and process

Companies must reclaim the right balance of standardization and flexibility and develop agility.

By LIISA SULLIVAN
Correspondent

The big picture can often get a bit murky when you try to fit in lots of little pictures. So, how do you strike a balance between keeping the big company vision within your line of sight while still adhering to internal processes?

Innovation comes first. James Swanson, CEO, **Kitchell** (Phoenix, AZ), a 648-person architecture and engineering consulting firm, says that while it's important to follow protocols, the company also encourages innovation.

"If we get bogged down in processes and procedures, our work becomes uninspiring," he says. "We do what we can to encourage creativity and new ideas, to keep our work fresh and bold, and to foster a spirit of entrepreneurialism and diversity within our business. As an employee-owned company, we are a unique enterprise, with capabilities that include engineering and architecture to all aspects of development and construction, and operations in major regions throughout the country and Latin America."

Swanson says that Kitchell's service diversity and geographic expansion programs are a direct consequence of its entrepreneurial environment. Every new idea is vetted. Bigger ideas that require significant capital investment are formally presented to a "New Ventures" committee comprised of senior company leaders.

"Our significant business growth over the past 64 years is due to this continual pursuit of new ideas and attentiveness to protecting our mutual investment," Swanson says.

Freedom through standardization. That said, Swanson does realize that universal protocols have tremendous value as Kitchell evolves as a company with disparate geographies and operations.

"I refer to it as freedom through standardization – the more we follow processes, the more we have the flexibility to be creative and pursue high-value projects," he says. "Though it might seem tedious to some, it only makes sense to have uniform financial reporting, recruiting, training and accountability systems, among others."

As a company that has evolved from an entrepreneurial mindset, sometimes these common processes are challenging to introduce and enforce. Employee owners at Kitchell ultimately understand and embrace the value that these efforts bring. For example, Kitchell has a sophisticated recruitment and professional development program that is used by all of its companies, a common IT platform that enables it to all share the same software and safeguards, and most recently a commitment to safety as a core value that spans every aspect of its operations.


James Swanson, CEO, Kitchell.

> "If we get bogged down in processes and procedures, our work becomes uninspiring. We do what we can to encourage creativity and new ideas, to keep our work fresh and bold, and to foster a spirit of entrepreneurialism and diversity within our business."


Shane Dworaczyk, President and CEO, Testengeer Incorporated.

Vision and processes go hand-in-hand. Shane Dworaczyk, president and CEO, **Testengeer Incorporated** (Port Lavaca, TX), a 275-person full-service engineering firm, explains that a company's vision and the processes must work together to support long-term focus and success.

"Vision and entrepreneurship usually involve some sort of risk, while processes are typically developed to standardize methods and to minimize risks," he says. "The company's vision and the processes involved to achieve this vision should be developed to include an acceptable calculated risk that the company endorses. This will help ensure its employees clearly understand the company's expectations in its quest to achieve its vision."

Dworaczyk says doing the above will minimize getting bogged down in processes that could possibly have a negative impact on the overall vision.

Dworaczyk and Swanson are on the same page about the function of processes.

"Well-developed processes that support the company's vision can be very healthy to an organization," Dworaczyk says.

Dworaczyk adds that individuals with a strong sense of vision do not always see value in following processes – they may even view them as a hindrance. On the flip side, people who value processes may not always be visionaries. As a result, having well-writ-

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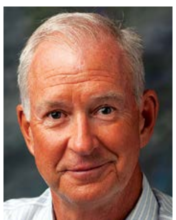
FEEDBACK

Simplify or not?

A reader responds to a recent Mark Zweig editorial.

In his editorial titled "Simplification for greater success," published in the April 7, 2014 issue (#1050) of **THE ZWEIG LETTER**, Mark Zweig shared some ideas on how firms can simplify processes and accrue benefits. Frank Dudek, president, **Dudek** (Encinitas, CA), a 300-person environmental consulting firm, wrote:



Frank Dudek, President, Dudek.

Mark, I too like to concept of simplification, particular one's life as we get older, as we have accumulated more complicating things over many years. And, I agree with simplification of one's internal organization, so your people can figure out how to get things done with the fewest roadblocks and bureaucracy.

As for simplification of the services one provides, I may argue that that's not always the best plan. For example, imagine the potential fee and competition a firm would face, particularly in California, for replacing a sewer line down an average city street; compared with replacing a leaking sewer pipeline in a natural waterway/wetland involving endangered species, native American artifact issues, looming water quality fines and extremely touchy right-of-way and access issues.

In the first case, a client can take his time and solicit proposals from numerous civil engineers, and grind down the price of the finalists for as long as necessary. In the latter case, facing accumulating fines and negative publicity, I'll wager a client will choose to contract ASAP with a competent, multi-disciplinary firm that can expeditiously handle all the issues mentioned, for whatever price is necessary to expeditiously make this growing problem go away.

Taking his time to carefully solicit RFPs and fees from multiple civil engineers, biologists, archaeologists, wetlands permitting experts, habitat restorationists, etc., and coordinating their efforts while the clock and fines are ticking away would not be a good option. My point, obviously, is offering a suit of complex but coordinated services may be a much better approach to servicing increasingly complex infrastructure issues.

"I agree with simplification of one's internal organization, so your people can figure out how to get things done with the fewest roadblocks and bureaucracy. As for simplification of the services one provides, I may argue that that's not always the best plan."

Mark Zweig responds:

That's a good point. But simplification may not necessarily mean reducing your offerings but instead simplifying your processes and work products.

That said, there are many companies that do a lot of things they aren't good at/efficient at and for them. Exiting some of those service lines and spending their energies on what they do well may help them be more successful.

All the best, Frank, and thank you for writing!

CALENDAR

PRINCIPALS ACADEMY: The Principals Academy, a crash course in all aspects of managing a professional services firm, is coming to several cities.

The program is presented by a team of speakers – including ZweigWhite founder and CEO Mark Zweig – with extensive experience working with and for A/E firms.

They have a clear understanding of what it takes to survive, and even thrive, in any economy.

The two-day agenda covers six critical areas of business management from the unique perspectives of architecture, engineering and environmental consulting firms, and is presented in tutorial and case study workshop sessions.

The Principals Academy program also includes a case study workshop session that will provide an opportunity to practice implementing these management strategies in a supervised test-case scenario.

Upcoming events include June 12 and 13 in Pittsburgh, Pa., Oct. 16 and 17 in Los Angeles and Nov. 13 and 14 in Miami.

For more information or to register, call 800-466-6275 or log on to www.zweigwhite.com/seminars/tpa.

BECOMING A BETTER SELLER: Could every person in your firm describe your services in a succinct and persuasive way that demonstrates what sets you apart from the competition? It's not enough to have the technical expertise to complete projects, you need seller-doers who can convey excitement and tailor the message for the audience.

That's why ZweigWhite developed a one-day program that will help anyone who could possibly be involved in selling and who wants to be more successful and increase their value to their employers – design and technical professionals as well as marketing and business development professionals, principals, managers, architects, engineers, planners, scientists, surveyors, designers; anyone who wants to know more about selling.

Becoming a Better Seller was specifically developed to help design and technical professionals become more comfortable dealing with clients and promoting the firm and your services.

Seminars will be led by Mark Zweig, ZweigWhite CEO and chairman, or Chad Clinehens, executive vice president, ZweigWhite.

Seminar dates scheduled for 2014 include June 26 in Chicago.

Group discounts are available for teams of four or more attendees from the same firm. Please call 800-466-6275 or log on to www.zweigwhite.com/seminars/better_seller for details.

SURVEY

Finding and developing leaders

Survey finds that firms look both inside and outside, set requirements, and implement training programs to develop their upper ranks.

By CHRISTINA ZWEIG
Contributing editor

Ownership and management roles can be powerful incentives to attract and keep the best people at A/E/P and environmental consulting firms – but how do firms decide who gets to step into these positions?

Design firms are faced with two options: look outside the company or promote from within. The fresh perspective and experience of an external hire can be a vital infusion at some firms, but it comes at a cost that could be more than monetary.

University of Pennsylvania Wharton management professor Matthew Bidwell researched this topic and authored a paper, "Paying More to Get Less: The Effects of External Hiring versus Internal Mobility." He found that external hires have higher exit rates and are paid about 18 to 20 percent more than internal hires. Bidwell also noted that external hires have lower performance evaluations in the first two years, and need about this time period to acclimate to their new jobs due to the amount of time necessary to learn how to be effective in their new organization – specifically, how to build relationships.

Bidwell was quoted in a March 28, 2012 Wharton article titled, "Why External Hires Get Paid More, and Perform Worse, than Internal Staff," saying, "People hired into the job from the outside often have more education and experience [than internal candidates], which is probably some of the reason they are being paid more."

"When you know less about the person you are hiring, you tend to be more rigorous about the things you *can* see" – such as education and experience levels listed on a person's résumé. Yet, "Education and experience are reasonably weak signals of how good somebody will be on the job," Bidwell said.

While establishing eligibility requirements is one way to make sure you're promoting the best and the brightest in your firm, this can also lead to unnecessary red tape or impede a well-deserving person from stepping into a new and better role. Likewise, creating requirements can be a tricky task as it's important to identify that someone who has been able to attain particular goals (such as years of experience and education) may still not have the skills, attitude, or other qualities that are important to senior management positions.

Brian Bowers, President, Bowers + Kubota.

GOOD TO KNOW

48 percent of principals say they would choose the same peers and 35 percent say they would choose different peers if they had a chance.

2014 Principals, Partners and Owners Survey, ZweigWhite, www.zweigwhite.com/p-2193-principals-partners-owners-survey-2014.

SPLIT ON REQUIREMENTS. ZweigWhite's 2014 Principals, Partners and Owners Survey found that A/E/P and environmental firms were evenly split on this issue. Just about half of principals (49 percent) report their firm has minimum eligibility requirements to become a principal, something that has remained relatively consistent over the years ZweigWhite has conducted the survey. The survey also found that large firms are more likely to establish specific minimum eligibility criteria for becoming a principal than small firms.

> "The feedback from performance reviews, as well as the opportunity for staff to prepare individual development plans, place focus on staff development that is consistent with individual strengths and personal goals, as well as the company goals."

Of those firms with eligibility requirements for becoming a principal, professional registration/licensure is the most common, followed by business development/sales abilities, project management experience, staff management responsibilities, a minimum number of years' experience (typically 10 years), and a minimum number of years of service to the firm (typically five years). The survey also found that 22 percent of current principals at A/E/P and environmental consulting firms have had college-level business education.

Brian Bowers, president of **Bowers + Kubota** (Waipahu, HI), a 118-person employee-owned architectural/engineering firm, said his firm does have a set of eligibility requirements. "It is very specific and contains both quantitative and qualitative items. It is written and published. We actually have written criteria for all levels of promotion: associate, senior associate, and principal," he says.

Other significant stats from the survey:

- When good systems aren't in place, the results can be disastrous. The survey asked principals, partners and owners, "Do any of the principals in your firm abuse their position by failing to pull their weight?" and found that 30 percent of respondents said, "Yes."

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Smile, you're on camera

Tips for a well-produced conference video presentation. Remember, the camera sees everything!

Marilynn Mendell

GUEST SPEAKER

The rage today is video. Speakers want to have their presentation on YouTube or on their website. Everyone knows that public speaking has many advantages. Speaking could be a means to gain exposure to a wider client base, a way to build a reputation as an expert, or a path to a comped ticket for an expensive conference. Those may be all excellent reasons, but if travel expenses and lost billable hours become a cause for concern, then a *well-produced* video might help augment the plus side of the experience. Bear in mind that film acting is different than a live performance. If a mistake gets made when on stage without a camera present, course corrections can happen immediately and it will not live on the Internet for generations. There are plenty of questions to ask before agreeing to have yourself videotaped. One of the most important could be: "Will I be able to make edits before the video goes live?" Let's hope the answer is "Yes." If not, there's still a great deal that can be accomplished even if post-editing can't occur.

Begin with the basics within your control. What to wear? I habitually wear the same suit for a multitude of reasons. It doesn't get wrinkled in travel. Navy blue tends to exude authority. The jacket covers a wireless microphone hooked from the back and its color hides the wire. The jacket has pockets on both sides for my business cards and new friends, along with an inside deep pocket for notes. Make sure to polish shoes. If wearing socks, choose black as the darkness will fade out objects to focus the attention on the presenter's face. If wearing a suit with pants, pick a well tailored variety as bulky items accentuate weight on screen. Try to be as slim as possible before being filmed. Bright red lipstick can bring a woman's face to life. The more formal and refined the appearance, the better the image subliminally supports expertise. Attire signals a great deal and plays an important messaging role. However, dress is relative. Speakers must be themselves to be taken seriously. Plan to match the audience's expectations. A well tailored navy suit jacket, freshly ironed jeans, a clean white T-shirt with a cool logo, along with a new pair of black Converse high tops may elicit the right subliminal similarity for a start-up or tech group.

Next, consider asking a few questions before agreeing to be being videotaped. "Will I be able to have a copy of the video to post on my website?" Generally, speakers who pay their own freight and allow organizations the use of their filmed presentations get a copy of the video for free.

Will there be an audience? I get energy from the participants in my audience. The rowdier the bunch, the better. I love the interaction, but a freezing cold studio first thing in the morning with a two-person film crew can be pretty stultifying. And that happened to me. I had spoken to 450 people the afternoon before, and then zip. I had to ask myself, "What would Mr. Rogers do?" Talk to puppets. I'm still amazed that I took out a lipstick and made a puppet on my hand… but I did. There's a great book out there by Malcolm Gladwell, titled "David and Goliath" that speaks to the extremes dyslexics will go to because their entire lives they'd been outsiders and have had little to lose. Since I fall into that category, I would suggest that you refrain from drawing a mouth on your hand and think about how your presentation would go if there was no one in the audience to react to your jokes.

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Film acting is different than a live performance. If a mistake gets made when on stage without a camera present, course corrections can happen immediately and it will not live on the Internet for generations.

Balancing differentiation and consistency

The relationship between your corporate office and your regional offices and its effect on your brand.

Chad Clinehens

BRAND BUILDING

If you work in a firm with more than one office location, then should be able to relate to this topic: The "us versus them" mentality that tends to develop in regional offices.

Most of the time, this is a struggle between the regional office and the corporate office. It illustrates the desire for independence and autonomy that a regional or local office wants from corporate oversight. Some offices will express this desire in stronger terms than others – or in different ways. I've learned that this eternal struggle is not all bad, but can be unproductive and sometimes even destructive. As regional offices grow, often so does the desire to do more "in-house." This usually starts as a struggle with the overhead functions like marketing, accounting, human resources, and IT that are housed at the corporate office. There is usually great merit in having these functions centralized for consistency but the argument can always be made to do some of all of this at the local level. For companies that are interested in building a strong brand, managing this is of great importance.

Brand consistency is defined as the ability of your brand to remain consistent throughout all brand usage, across all channels and all locations. Because we are a service industry, we are presented with greater challenges when striving for brand consistency. This happens because we deal with people. What we produce is a result of people. The product industry has some advantages in that a product can be consistently made from the same exact formula independent of place and can be unaffected by local politics, culture, or personalities. Take Coca-Cola, for example. For 128 years, this company has produced a consistent product with one formula (with the exception of three months in 1985) that expanded across the entire globe. As design professionals, we cannot be that exact. In fact, our regional offices must adapt to the local culture and environment in order to be successful. The purpose of having people in those areas is to reflect the values and needs of the market. So the question is: How do we manage a consistent brand while allowing just the right flexibility that addresses the local needs of the market? Although we could write a multiple volume set of thick books on this subject, here are a few simple things you can consider to better manage this importance balance.

1) **Define your core brand and hold the entire company to its core values.** This includes logo, fonts, color schemes, basic beliefs, vision, and mission. Some of the basic differentiators that can traverse all markets and locations would fall into this category. This effort needs to be centralized and usually resides in the corporate office. More importantly, have someone in the firm that is accountable for leading, managing, and approving all activities that relate to these basic core values and functions.

2) **Recognize the marketing and selling activities that must have local input and influence.** These are usually SOQs, proposals, presentations, interviews and just about any activity that is more on the sales side. These are the messages that are going straight to the local client. Make sure that your regional staff is focusing their time on these activities versus trying to modify your general brochure, or developing numerous "local" versions of your marketing materials. These activities start eroding the core brand values and are counterproductive. Additionally, these "redesign" activities really build up the "us versus them" mentality that is hard to fight once it starts to fester.

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So the question is: How do we manage a consistent brand while allowing just the right flexibility that addresses the local needs of the market?

MARILYNN MENDELL, from page 6

Will my PowerPoint be sliced into the video? Never assume that the PowerPoint will automatically be integrated into the presentation. I gave an entire talk and kept instructing my audience out in the airwaves to look at something they would never see. It seems obvious that the people producing or even video tapping the performance would mention that the PowerPoint would not be filmed or incorporated into the session. In the real world, forget the obvious and come prepared. A presentation without supporting slides is NOT the same. It requires a totally different approach to presenting where the presenter faces their imaginary audience the entire time. It can sound preachy without training. When a speaker pays for their video to be produced there's a lot more control, but it's still important to know which questions to ask ahead of time.

May I discuss direction arrangements with the film crew prior to the taping? Adding slides into a film production isn't easy. The videographers need to carefully choreograph a dance between what's being said and what the slide shows. A company I worked with in Boston suggested providing the film crew with a preloaded stick ahead of the presentation. If done properly, the film team can have two people: one doing the filming and the other using a laptop and inserting the slides directly from the PowerPoint as you refer to the one up on the screen. It's so much harder to go back after and trying to insert or switch a slide. And it's worse if they film the slide while you're speaking. The slides become unreadable.

Where will the film crew concentrate their shooting? This question refers to the distance, angle, and expertise of the team. Request that the production people shoot close up without wide angle shots of the audience. Instruct them to leave out extraneous things such as the table next to the podium with water glasses on it. Have them end the video with the presentation's last slide, which should be the speaker's contact information, instead of people getting up and leaving.

Is editing included in the price? Understand that the editing can be costly, so it's best to make the first run as perfect as possible. The production team will be much more helpful afterward if the best effort was made ahead of time. Later, if there are adjustments, then go through your presentation and compose a document that stipulates exactly where in the time sequence to add or remove an item. Anything that can be done to be helpful to the videographers will save cash. Ask to have the video company download the presentation to a cloud service such as DropBox, as well as provide a DVD disc. A few companies (for additional fees) can provide snippets of the presentation that could get embedded into future client presentations. After adding the video to your website, refer to it often. Tweet about it, place on Facebook, or add it to electronic newsletters. Always provide a link in future speaker calls for presentation applications.

One final tip. Get a great speaking coach to help you brush up on your skills as video presents a different set of challenges and an outside viewpoint can help immensely. Break a leg.

MARILYNN DEANE MENDELL, president of WinSpin CIC, Inc., provides branding, change management, and public relations for clients in the Mid-Atlantic region. She's a nationally recognized speaker and adjunct professor at Georgetown and George Mason Universities. Her forthcoming book "Elbow Grease + Chicken Fat" is due for release in May 2014. www.winspincic.com or Twitter @winspincic.

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ten processes that provide guidance for employees to support and deliver the company's long-term strategic focus are extremely important to overall infinite success.

A blueprint for agility. Pricewaterhouse Coopers, a multinational professional services firm, reports that companies often find themselves bogged down by inflexible systems and processes. As a result, companies must reclaim the right balance of standardization and flexibility and develop a new core competency: agility. Building agility into a company's foundation can help anticipate change, while keeping your business on course and your customers happy.

Agility is the measured combination of standardization and flexibility that prepares a company for change and allows it to proactively shift course with minimal disruption. Agility starts with a common business view and language. Change starts with a shared understanding of a company's strategic vision. Every employee, at all levels, must understand how he or she contributes to the big picture. Next, by examining business processes to determine where flexibility and standardization are needed most, management teams can see what their people on the ground face every day.

Leadership can then rally people around common processes. This allows employees to see how their jobs fit into the big picture, and empowers them to deal with change on an ongoing basis and contribute to shared strategic goals. The business agility blueprint is at the core of an entire company. It's a high-level map of how a company creates unique value for customers, guiding senior management toward the best mix of flexibility and standardization. Developing a business agility blueprint allows you to better understand how your company can be agile, today and in the future. It requires you to:

- **Conduct rigorous scenario planning.** Consider the global changes that are likely to affect your business in the next three- to five years.
- **Identify need.** Identify the core, end-to-end business processes that enable you to deliver differentiated value to customers and determine which standard processes simply facilitate day-to-day operations.
- **Assess it all.** Evaluate your core, value-creating processes in the context of change scenarios. Determine which processes will be critical in the face of likely change.
- **Identify alternatives.** By identifying alternative business models, your company will be able to capitalize on change scenarios.

RIGHT NOW

Maximize template power

Standard materials are useful for smaller firms, but there are downsides; be judicious when using them.

By LIISA SULLIVAN
Correspondent

It would be great if a firm could craft a highly personalized document every time it needs to send a proposal out to really impress a client, but is that a reality? The answer is no. The reality is that many firms, namely smaller studios, can't afford to create new proposals for every pursuit. They use templates.

Saving time and improving efficiencies top the list for reasons to use templates, but you can also run the risk of getting into a rut. How do you use templates for proposals without making them look boring or, worse, avoiding making mistakes in updating a template – such as letting the name of another client slip in?

> "One setback in using templates is the feeling that you are stuck doing what you have always done. The creative process may be stifled a bit, or it may seem a daunting task to change things up and start something new."


Anna Hansen, Marketing and BD Manager, TerraTherm.


Jen Salvesen, Office Manager, ARW Engineers.

USE IT; DON'T ABUSE IT. **TerraTherm** (Gardner, MA), a 65-person firm specializing in the development and implementation of in situ thermal remediation of organic contaminants in subsurface source zones, has a fairly new proposal template that it uses; it can easily be personalized.

"Every project that we bid on is different, so we are constantly customizing our template to that specific bid," says Anna Hansen, marketing and business development manager. "Since the template is somewhat new, we continue to change bits and pieces to make it faster and easier for the next time we decide to bid on a project."

TerraTherm decided to create this template to make bidding on a project faster and more efficient. "Besides saving us time and creating efficiencies, the template also helps us to strengthen our brand by making sure that all of our proposals have the same layout and content," Hansen says.

However, there is also a downside. For example, it's possible that a client may be looking for something very specific that TerraTherm does not currently have in its template. Luckily for TerraTherm, the template is customizable to the point that it can meet any client's needs.

Jen Salvesen, office manager at **ARW Engineers** (Ogden, UT), a 23-person structural design and client-focused consulting firm, says that ARW's role is usually as a subconsultant. As a result, they are not often required to submit proposals to owners.

"More often than not, we submit marketing materials to the architect, who then puts everything together in a comprehensive proposal," she says. "However, for the marketing materials we send, we do have templates for those that can be easily modified to achieve a customized look and feel."

These marketing materials include items such as: résumés, project descriptions, and firm profiles. Each

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TIPS FOR USING BOILERPLATE PROPOSALS

OST Global Solutions, Inc. is a Washington DC firm that helps businesses to grow organically. It advises that having a proposal library is a great idea, just make sure you don't let details slip through the cracks.

- **Invest in frequent updating, and maintain rigorous configuration control.** Don't have too many hands on it – as the old saying goes… too many cooks.
- **Be an eagle eye with editing and proofing.** For example, you don't want the wrong client name to sneak in.
- **Start over when you need to.** If the template has a very specific look and you know your client will not like it, don't try to force it. You're better off to brainstorm and start from scratch. Many writers will spend more time tailoring the sections, rather than just starting over.
- **Don't fall for the illusion.** Boilerplate can actually create an illusion that a section is done, when it actually needs to be redone. Be thorough and carefully read it through.

So, while OST does recommend building a library of reusable content, it also recommends that you be judicious.

WHAT'S WORKING

Several pieces were included in this campaign: a mailing that included a postcard, hot cocoa and mug, website updates, employee spotlight on new hire, John Wentz, director of water and wastewater services, e-blast and social media posts, and collateral materials.

[CLEAN] WATER **Procces Plus** tackled the less-than-sexy subject of industrial wastewater in a new service announcement that emphasized the end-result: clean water.

The 100-person Cincinnati, Ohio, engineering, architecture and construction firm won third place in the Integrated Marketing Campaign category of the 2013 Marketing Communications Excellence Awards.

Process Plus wanted to create a fun, eye-catching campaign to announce a new service – industrial wastewater services. The "Just add [clean] water" campaign announced this service as well as a new hire to lead the department. Several pieces were included in this campaign: a mailing that included a postcard, hot cocoa and mug, website updates, employee spotlight on the new hire, John Wentz, director of water and wastewater services, e-blast and social media posts, and collateral materials.

What works:

- Lots of different "touch points" and materials with different parts of the same overall message.
- Following up. All 102 current and potential customers targeted were also contacted by phone by Wentz or by the sales team – now that's customer service!

Results:

Process Plus stated a goal of winning at least one project within the first six months of the campaign's launch. All 102 target customers were contacted by phone within a few weeks of the mailing: 26.5 percent of the target companies were reached, all of which remembered the mailing. Of the contacts made, 52 percent requested additional information. Fourteen follow-up emails were sent, resulting in six meetings and two project proposals. Both projects were won!

RESOURCES

MARKETING SURVEY: Developing a good marketing strategy is the first step toward winning more work. The 2013 Marketing Survey of Architecture, Engineering & Environmental Consulting Firms contains the latest intel on what firms in this industry are doing now to compete.

The 2013 Marketing Survey contains hundreds of valuable statistics, approaches, results and analyses of marketing practices. Some of the info you will get access to includes:

- Are other firms increasing or decreasing their marketing budgets?
- How many A/E firms use social media; how are they using it?
- What kind of marketing-related training do other firms offer?
- What is the scope of responsibilities for marketing managers?
- What kind of sales goals and targets are established for marketing and BD staff?
- Do marketing professionals participate in business planning?

For more information or to buy a copy, call 800-466-6275 or log on to www.zweigwhite.com/p-2166-marketing-survey-2013.

WHAT'S WORKING

Objectives of the reception included celebrating the ARBTA's efforts in advancing public transportation, being a good ambassador for the city, and creating business development opportunities for the firm.

TRANSPORTATION CELEBRATION When the American Public Transportation Association's annual rail conference came to town, **Urban Engineers** spread out the welcome mat by holding a special reception at their headquarters.

The effort earned the 450-person Philadelphia engineering, management and science firm second place in the Special Event category of ZweigWhite's 2013 Marketing Communications Excellence Awards.

Objectives of the reception included celebrating the ARBTA's efforts in advancing public transportation, being a good ambassador for the city, and creating business development opportunities for the firm.

Because conference attendees were going to be in meetings most of the day, Urban Engineers wanted to provide them with a quick, all-in-one opportunity to experience the best their city has to offer. As a result, they coined the "U Got Philly" concept. For the event, Philadelphia's public transportation agency, SEPTA (also named best organization at the 2013 rail conference) provided free bus transportation, catering featured classic Philadelphia fare and local beer and wine, and historical reenactor Steve Edinbo performed as the former president and Philadelphian, Thomas Jefferson.

The event was held at Urban's headquarters, which had beautiful views of Independence Mall and Independence Hall. Also included: after hours tours of the Hall and Liberty Bell.

What works:

- Pairing a marketing campaign with a larger event held by another institution is an effective way to broaden your reach.
- The "U Got Philly" email campaign used bold images and phrases to communicate the event's features, such as, "You Want Philly? U Got It" and, "Life, liberty, and the pursuit of transit."

Results:

The "U Got Philly" event was a great opportunity to market Urban Engineers and create business development opportunities for the firm. More than 50 potential clients and teaming partners attended the event. Urban's professionals were able to make business connections during the event, which have resulted in client and teaming partner meetings. Partnering organizations were also able to gain greater exposure and support for their missions.

AWARD WINNERS

HARGROVE RECEIVES AWARD: Ralph Hargrove, president and founder of **Hargrove Engineers + Constructors** (Mobile, AL), a 890-person full-service engineering, procurement, and construction management firm, has recently received the Drug Education Council's Joseph Treadwell Award, given to a business or community leader who has gone above and beyond to take care of their employees and has supported local charitable organizations on a continuing basis.

"I am honored to receive this award on behalf of our team," Hargrove said. "We believe in the power of prevention and in providing facts about the dangers of substance abuse to our community so that they are empowered to make good, healthy choices."

The Drug Education Council promotes education and awareness in making healthy choices in all aspects of life, including the workplace. Hargrove Engineers + Constructors has partnered with the Drug Education Council to provide information about substance abuse to teammates and to support them in the community.

SHANNON RECEIVES AWARD: Jim Shannon, associate fisheries biologist in **Hart Crowser**'s Edmonds, Wash. office, has been presented the Award of Merit from the Washington-British Columbia Chapter of the American Fisheries Society.

The award is presented to an individual who has made substantial contributions to the success of the chapter. Shannon was recognized for his years of service to the chapter's executive committee and for being the chairperson of the annual 5 kilometer Spawning Run for five consecutive years. He began as newsletter editor of the Chapter in 2006 and became vice president in 2008, president-elect in 2009, president in 2010, and past-president in 2011. He continues his involvement by chairing the Spawning Run for the 2015 conference in Vancouver, BC.

"The American Fisheries Society makes a difference by helping build fisheries knowledge, providing a means for colleagues to share perspectives, and connecting students and young professionals with mentors," Shannon said.

Hart Crowser is an employee-owned geotechnical, environmental, and natural resources consulting firm headquartered in Seattle, with offices in Edmonds and Vancouver, Wash., Portland, Ore., and Anchorage, Alaska.

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- Due to ownership transition and succession, many firm principals also have peers they didn't "choose." When asked if they could do it all again, 48 percent of respondents to the survey said they would choose the same peers and 35 percent said they would choose different peers. The number of firms reporting they have fired or laid off a principal due to non-performance has risen in recent years to 37 percent (up from 28 percent last year) and 19 percent of firms report firing a principal due to misconduct. Still, the number of firms reporting they have never fired or laid off a principal for any reason is at an all-time low of 35 percent.

Developing a full package. Sonia Olton, human resources manager, **West Yost Associates** (Davis, CA), a water, wastewater, and stormwater planning, design, and construction management firm, said her firm also has requirements for different staff levels and has an integrated process of staff feedback, performance reviews, and career development guidelines.

"This past year, as a result of our strategic planning process, our company provided additional transparency to employees regarding performance and metrics," she says. "Increased transparency included changes to our performance review process as well as enhancing our regular monthly all staff meetings with financial updates and developing real-time performance metric dashboards on the company intranet. The dashboards allow individuals to readily access their personal metrics, the metrics of staff they directly supervise, and the overall metrics of the entire company."

Olton also said that one of her firm's strategic initiatives this past year was to develop and reward its workforce.

"The feedback from performance reviews, as well as the opportunity for staff to prepare individual development plans, place focus on staff development that is consistent with individual strengths and personal goals, as well as the company goals," Olton says.

As a part of this process, West Yost Associates implemented a new "Career Development Guidelines Matrix" that provides a general summary of the knowledge, skills, and responsibilities at each staff level. The metric assists employees and their supervisors in understanding an employee's level of professional development and aids in identifying opportunities for career advancement.

"The career development guidelines provide a structure for evaluating employee performance in a range of categories. These guidelines assist managers in working with employees to set appropriate performance goals, giving employees regular coaching and feedback, determining appropriate career development goals, and explaining possible career opportunities or available career paths. The new guidelines help performance and payment discussions between the employee and manager," Olton says.

To further this process, West Yost implemented an Individual Development Program that will serve as a tool to help employees identify and achieve their individual development goals.

Olton says: "Establishing an IDP allows employees to create a strategy that puts them on a path to achieve their career aspirations. These may include business development, expansion of a particular skill set or knowledge base, change in technical focus, or retirement. The IDP is also a tool for communicating and planning the resources needed to support their career action plan."

CHAD CLINEHENS, from page 7

3) **Have a system of formal communication between your corporate branding staff and the local/regional staff involved in marketing and business development.** Make sure there is a productive exchange of information and resources are easily accessible to regional staff, when needed. This cuts down on renegade type marketing that is isolated from the core brand. Lack of communication is the quickest way for your regional offices to get off track and lose sight of the overall vision and brand.

Next to differentiation, consistency is the second most important principle of branding. Balancing differentiation and consistency perfectly illustrates the role of the regional office and the corporate office functions. Use your regional people to define that differentiation while relying on corporate guidance for branding consistency. It is really about trust. Make an aggressive effort to unify your people and build trust among your teams. Reinforce that we are all on the same team while recognizing the unique contribution that other groups/offices offer. Show your people where to contribute and give them the appropriate roles that bind everybody together for the common good of the company.

CHAD CLINEHENS is ZweigWhite's executive vice president. Contact him at cclinehens@zweigwhite.com.

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piece of collateral can be customized according to what the client wants and can include as much, or as little information, as is being requested.

Salvesen says that these templates are very efficient because you don't have to spend a lot of time recreating and trying to find layouts and designs that work well. Each piece just needs to be customized to the specific needs of the client or owner. This typically just entails adding, deleting, or modifying small amounts of information.

"Templates are also helpful when you are asked to prepare materials with a limited amount of time," she says. "Information can easily be put together and sent out, but it doesn't look rushed or thrown together at the last minute."

On the other hand, Salvesen says there's a downside too.

"One setback in using templates is the feeling that you are stuck doing what you have always done. The creative process may be stifled a bit, or it may seem a daunting task to change things up and start something new," she says. "It can cause you to get into a rut."