THE ZWEIG LETTER

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MARKETING SUPPLEMENT

Pages 7 - 12

July 22, 2013, Issue 1016

Client management tips

Mark Zweig offers 13 lucky suggestions on how to be closer to your clients.

Don't use work you're doing for another client as a justification for your inability to perform.

Mark Zweig

EDITORIAL

How you manage your clients is a big part of success in the A/E or environmental consulting business. And these skills and tactics are something that can be learned (as long as there's someone there who can teach it).

Here are my thoughts:

1. **Be straight with your clients.** Don't be afraid to tell them you value and appreciate them if you do. Conversely, don't be afraid to tell them it's not working out for you if it isn't. They may care enough to fix the situation.

2. **Be yourself around your clients.** Don't be a chameleon. Don't be a fake. Fakes are liars. By being yourself at all times you will distinguish yourself from a sea of liars and poseurs.

3. **Keep your politics to yourself when with your clients.** No matter what side you're on – no matter how righteous you feel your position is – if you go public with it you will anger about half of your clients and potential clients. Why do that?

4. **If you screw-up working for a client, admit it.** While your professional liability carriers and attorneys may disagree, it's best to

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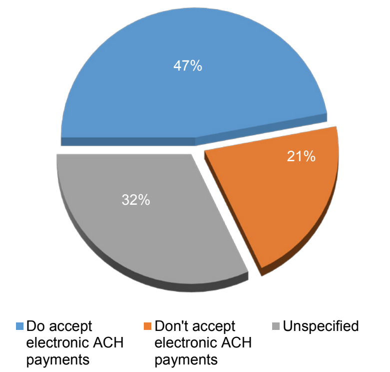
TRENDLINES

ePay



ZweigWhite's 2013 Fee & Billing Survey finds that close to half of A/E/P and environmental consulting firms accept electronic payments. In fact, according to the just-released report, 47 percent of respondents report that they use ACH electronic transfer as a way to facilitate timely payment.
– *Margot Suydam, Survey Manager*

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A/E BUSINESS NEWS

SKANSKA SNUBS U.S. CHAMBER: Skanska USA, an international construction and development firm, announced that it has resigned as a member of the U.S. Chamber of Commerce to protest the organization's backing of a chemical industry led initiative to effectively ban the future use of LEED for government buildings. The initiative, linked to lobbying efforts by the chemical industry related to the Shaheen-Portman Energy Efficiency Bill (S. 761), threatens to halt years of progress in energy efficient and environmentally responsible construction.

The Chamber is supporting the American High-Performance Building Coalition, a lobbying organization that harbors the American Chemistry Council and opposes the implementation of the new, stronger LEED certification program (LEEDv4), which encourages transparency in reporting the chemical composition of building materials. The AHPBC is advocating for an amendment to S. 761, which will effectively ban the use of pro-innovation and voluntary LEED certification by the government. The LEED program has helped grow the green building industry to where it currently contributes more than $554 billion to the U.S. economy and creates more than 7.9 million jobs annually.

During discussions in early July, Skanska asked the Chamber's leadership to reconsider its position and remove its support for the AHPBC's position concerning LEED, which, according to Skanska, would significantly undermine the LEED program, impact more than 196,000 LEED-accredited professionals, and cripple the progress of environmentally responsible construction across the country. When talks broke down, Skanska removed its name and its funding in protest of the Chamber's decision.

NEW LEED: The U.S. Green Building Council announced that its membership has voted to adopt LEED v4, the next update to the world's premier green building rating system. The final overall vote was 86 percent in favor of adopting LEED v4.

"There are 46 countries and territories around the world and all 50 U.S. states (and the District of Columbia) represented in the voting pool for LEED v4, which includes an extraordinarily diverse group of industry professionals, manufacturers, educators and other green building leaders," said Joel Ann Todd, chair of the LEED Steering Committee. "USGBC sets a very high bar for a rating system to be approved. The rating system must earn a significant percentage of the overall vote as well as a majority approval from each of the various LEED stakeholder groups. This ensures that rating system approval represents the full diversity of USGBC's membership."

Over the course of LEED's development cycle, the program undergoes a series of public comment periods ending with a final ballot, during which USGBC members vote on whether to adopt the changes within the final proposed system.

Starting this summer, USGBC will offer education on LEED v4 in the form of webinar suites, and the full program, along with reference guides, will be unveiled at this year's Greenbuild International Conference & Expo. There are more than 100 projects pursuing certification through the LEED v4 beta program, with projects currently in the review phase. Enrollment for the beta program is still open.

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just face up to your mistakes and make them right to fix problems. This applies to any problems you have created through errors or otherwise.

5. **Call your clients even when you don't want something from them.** One of my absolutely greatest pet peeves is those people I never hear from other than when they're trying to sell me something.

6. **Just because you've made a handoff to a more junior person doesn't mean you can't ever check in with the client.** In fact, it's essential you do. Don't assume just because you aren't hearing anything that it's all good news. You may just not be hearing about it. Call and ask.

7. **There is always something you can do for a client to extend a kindness and show you care.** Everyone wants to feel they're loved. So show your clients you care about them as individuals by genuinely trying to help them with their business – and at certain times personal problems.

8. **Ask questions and listen more to your clients than you talk about yourself.** They may like you and care about you but they'll like you and care about you MORE if you are a good listener. Remember, you are there to help them, not vice-versa.

9. **Don't use work you're doing for another client as a justification for your inability to perform.** No client cares to hear that you cannot deliver for them because you are working for someone else.

10. **Be accessible to your clients.** Stop having all your calls go through an administrative assistant. Put your cell number on your business cards and email responses. Have a direct dial number. Be easy to find.

11. **Be responsive to your clients.** Returning calls and emails is of prime importance in today's business climate. It may be even more important than the actual work you do in some cases.

12. **If a client wants something you know you're not going to be able to deliver on, tell them so.** There's nothing worse than accepting a project assignment and not being able to deliver.

13. **If a client is going to do something that you know is not in their best interests, let them know you are concerned for them.**

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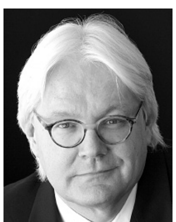
PROCESS

Standard operational procedures needed

Has your firm determined the best possible way to do a particular operation in your business?

By LIISA SULLIVAN
Correspondent

Standard operational procedures, also known as SOPs, make life easier for firms. Firms with multiple locations pose multiple challenges. For example, is technical staff using the same design and technology solutions across the board? How about staffing? How is that handled? Are there specific SOPs that must be followed? Why does all of this matter?


Bruce Toman, Principal, Perkins+Will.

CONSTANT COMMUNICATION. Bruce Toman and William Schmalz, both technical directors and principals at **Perkins+Will** (Chicago, IL), a 1,500-person multidisciplinary architecture and engineering firm, say the company has created initiatives with representatives from each office to develop standards that are based on corporate knowledge for project management, project delivery, contract document development, computer-based building information modeling, and office operations management.

"Our standards for project management and document and BIM development comprise our Project Delivery Manual (PDM), which is available to all employees on our intranet," says Toman. "Our firm-wide quality program provides all employees with the appropriate tools to perform their tasks. Project deliverables are reviewed for conformance with our standards and our quality program by senior project architects before the completion of each project phase."

Staffing is consistently managed by the operations director in each office, who works with the project principals and

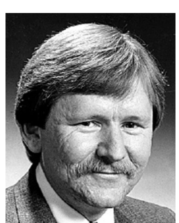

William Schmalz, Principal, Perkins+Will.

project managers to determine appropriate staff utilization and to monitor costs.

"As a function of our people's creativity, we allow for an iterative, non-linear design process while managing the development of deliverables to match our contracts and standards," Schmalz says. "Because communication between team members and clients is so important to the design process, our initiatives enhance effective team communications and interdisciplinary collaboration within internal and external teams."

Perkins+Will prefers that the creativity of its people be invested in the architecture and interior design of client projects, not in reinventing processes that have proven successful over years of corporate experience.

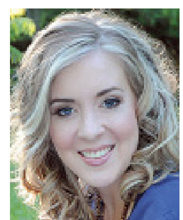
Toman and Schmalz agree that communications through Perkins+Will's initiatives, recording its standards in its Project Delivery Manual, and consistent application of those standards and its quality assurance process are effective methods of corporate risk management.


Mark Jones, COO, HKS, Inc.

Mark Jones, chief operating officer for **HKS, Inc.** (Dallas, Texas), a 950-person international architecture firm, says the company's offices operate on the same drawing, design, and modeling software platforms.

In order to ensure everyone is on the same page when it comes to projects and staffing, each week, all offices attend staffing meetings via video conference. This allows staffing resources to cross-utilize based on immediate and longer-term scheduling needs.

"It is this consistency that allows our product to be uniformly and efficiently developed at all offices," he says.


Caitlin Carpenter, Director of Communications, Enermodal Engineering.

GREEN GIVES GUIDANCE. At **Enermodal Engineering** (Kitchener, ON), a 100-person consulting firm exclusively dedicated to creating green buildings and communities, Caitlin Carpenter, director of communications, says that Enermodal uses the LEED EB:O&M (Existing Buildings: Operations & Maintenance) standards as a baseline across all of its offices – even though only the Kitchener office is certified EB:O&M Platinum.

"These standards cover purchase policies for everything from toilet paper to pens, alternative transportation such as bike racks and showers, and building operations (such as composting, landscaping and housekeeping)," Carpenter says. "Our staff can – and is encouraged to – go above and beyond these baseline standards to improve their operations from employee health and wellness and sustainability perspectives."

Carpenter explains that it's important to have a baseline level of acceptable

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WHY ARE STANDARD OPERATIONAL PROCEDURES IMPORTANT?

SOP MD, owned by Select Tech Professional Services, provides process creation services, workforce development support and 5S consulting (5S stands for Sort, Set in Order, Shine, Standardize and Sustain). SOP MD was created to provide businesses with an effective tool for establishing their expectations of how things must be done to be as proficiently and efficiently as possible in all areas of their operation. It explains SOPs as what you and your team have determined to be the best possible way to do a particular operation in your business. SOPs help a business to have predictable end results, something that can be repeated again and again. SOPs enable you to work smarter, not just harder.

NEWS

2013 Best Firms To Work For

The best places to work for in the design industry in 2013 have been identified.

ZweigWhite bestowed the award to firms in five categories during the Best Firms To Work For Conference in Chicago in late June – architecture, structural engineering, civil engineering, environmental, and multidiscipline.

Here are the 2013 winners:

ARCHITECTURE

1. Davis Bews Design Group, Inc.
2. Huckabee
3. English + Associates Architects
4. Randall-Paulson Architects, Inc.
5. M.C. Harry & Associates, Inc.
6. FreemanWhite, Inc
7. Walcott Adams Verneuille Architects
8. OPN Architects, Inc.
9. FRCH Design Worldwide
10. Lionakis
11. Sillman Wright Architects
12. KSQ Architects

CIVIL ENGINEERING

1. Affinis Corp.
2. Bowers + Kubota Consulting, Inc.
3. Foresite Group, Inc.
4. Choice One Engineering Corporation
5. Comprehensive Environmental, Inc.
6. Nitsch Engineering, Inc.
7. Barr Engineering Company
8. Kjeldsen Sinnock & Neudeck Inc.
9. Simpson Gumpertz & Heger Inc.
10. Provost & Pritchard Consulting Group
11. CRW Engineering Group, LLC
12. Hall & Foreman, Inc.
13. Schnabel Engineering, Inc.
14. R&M Consultants
15. Gunda Corporation, Inc.
16. A Morton Thomas & Associates Inc.
17. Trigon Associates, LLC
18. Delta Airport Consultants Inc.
19. Traffic Planning and Design, Inc.
20. R.A. Smith National, Inc.
21. DKS Associates
22. Slater Hanifan Group
23. Cannon & Cannon, Inc.
24. Hattenburg, Dilley, & Linnell, LLC
25. Draper Aden Associates

ENVIRONMENTAL

1. Comprehensive Environmental, Inc.
2. All4, Inc.
3. Barr Engineering Company
4. NGE
5. EHS Support, LLC
6. Zephyr Environmental Corporation
7. Johnson Wright, Inc.

MULTIDISCIPLINE

1. Bowers + Kubota Consulting, Inc.
2. GATE, Inc.
3. Process Plus
4. Arcturis
5. Trigon Associates, LLC
6. USKH, Inc.
7. Lilker Associates Consulting Engineers
8. Pond & Company
9. GeoDesign, Inc.
10. IIW, P.C.
11. JBA Consulting Engineers
12. Luckett & Farley
13. PDC Inc., Engineers
14. O'Neal, Inc.
15. FRCH Design Worldwide
16. Hanson Professional Services Inc.
17. Lionakis
18. Dyer, Riddle, Mills & Precourt (DRMP)
19. Allana Buick & Bers, Inc.
20. Braun Intertec Corporation

STRUCTURAL

1. Barrish Pelham & Associates, Inc.
2. ARW Engineers
3. Huckabee
4. Douglas Wood Associates, Inc.
5. Hinman Consulting Engineers, Inc.
6. Structura, Inc.
7. Ehlert/Bryan, Inc.
8. Bracken Engineering, Inc.
9. Simpson Gumpertz & Heger Inc.
10. Mulhern & Kulp Structural Engineering Inc.
11. Baldridge & Associates Structural Engineering, Inc. (BASE)
12. Reaveley Engineers + Associates, Inc.

CALENDAR

2013 HOT FIRM CONFERENCE: THE ZWEIG LETTER Hot Firm Conference is THE most exciting annual event for A/E firms because it's all about how to achieve success in this industry.

Every October since 2000, ZweigWhite has recognized the fastest-growing architecture, engineering, planning, and environmental consulting firms.

This year's event will be Oct. 24 and 25 at the Eden Roc Hotel in Miami Beach, Fla.

Firms on THE ZWEIG LETTER Hot Firm List receive a special award during a black tie celebration dinner at The Zweig Letter Hot Firm Conference. CEOs, owners, presidents, principals and other leaders from the top design and environmental firms, along with entrepreneurs, authors, and business experts come to this conference every year to share industry news, compare strategies for success, learn from their peers, and leave with renewed inspiration for another successful year.

THE ZWEIG LETTER Hot Firm Conference features:

- Keynote presentations by CEOs of the most successful A/E/P and environmental consulting firms today
- Breakout discussion groups where firm leaders share strategies to common challenges
- Welcome cocktail reception on the first night of the conference
- Black tie awards reception and dinner with live music and dancing
- Beautiful locations where attendees can network and recharge and their spouses and families can relax

Here's what a few of the attendees from the 2012 conference had to say about the event:

"An exceptional opportunity to interact with CEO peers."

"Again excellent conference, I have attended 4 times and have never been disappointed in the content. Where else can someone in our industry share thoughts & ideas with the collective 'best of the best'?"

"Well organized; good opportunity for input. Considerable value for participants."

For more information visit www.zweigwhite.com/conference/hotfirm.

To register call 800-466-6275 or log on to www.zweigwhite.com/conference/hotfirm/registration.php.

PHILOSOPHY

Ethics and work in the new economy

When entering into client relationships, the vision of your organization should be used as the standard.

By LIISA SULLIVAN
Correspondent

On the subject of ethics and working relationships, New York Times columnist Robin Progrebin states, "Some architects argue that it is unrealistic and self-serving for them to presume that they can transform a society or distance themselves from a patron's conduct." Elaborating on this concept, Barry Bergdoll, curator of the Museum of Modern Art in New York, says, "It's a problem as old as architecture and empire. Architects in the end are selling design services."

Frederic Bell, the executive director of the New York chapter of the American Institute of Architects, adds, "Sometimes architects like to think they're above the political fray. I think that's a little bit disingenuous. Sometimes it's very difficult to take commissions from countries with positions with which one disagrees."

With all this in mind, as architects and engineers look to potential clients, they must consider the question: As design professionals, are you ethically required to refuse selected projects that do not align with your corporate and individual vision and ideals?

DESIGN AND POWER. Architecture and design permeate all facets of society and culture. From historic spaces to new, innovative buildings, the design of a structure is intrinsically related to power – both economic and social.

Bernard Tschumi, the former dean of the Columbia School of Architecture says, "Architecture is always related to power and related to large interests, whether financial or political, yet there is a moment when the buildings are conceived as an expression of a political regime." When this happens, Tschumi adds, "it becomes a problem" because as creators, we have to believe in the message of what we design.

ROOTED IN HISTORY. Architecture and design have always been deeply engrained in cultures across the globe. Historical structures tell the story of people, communities, and the development of societies. Deyan Sudjic, director of the Design Museum of London, notes that historically architecture was encouraged to be on the cutting edge of social change. He references the early modernist period of architecture, adding that during that time, "architects were encouraged to embrace utopian goals like social housing." Reflecting on this concept, Sudjic ponders, "I suppose there was a kind of sense of disillusionment that architecture was about building better societies."

Sudjic acknowledges that there has indeed been a shift in this ideology, noting that today's design professionals "are careful about making emotional political stands about anything." He notes that taking stance, "can seem like sophistication, or it can seem like evasion" to potential clients and the larger society as a whole.

Steven Holl, Principal, Steven Holl Architects.

PEER TO PEER. Steven Holl, principal of **Steven Holl Architects** (New York, NY), a 40-person firm, believes that it is healthy for the design professional to think critically about potential clients, especially when considering international work. However, Holl affirms that his position as an architect is "to work in the spirit of international civilization and cooperation. You have to make a contribution."

This indicates that as design professionals, we must make a contribution to the design process and on the international stage – design is often the thread that binds communities on the international level. Building on the idea of work in the international community, and adding an analysis of political structure in those such relations, Thom Mayne, founder of **Morphosis Architects** (Culver City, CA), a 50-person interdisciplinary firm, says that, "Architecture is a negotiated art and it's highly political, and if you want to make buildings there is diplomacy required."

Praful Kulkarni, President and CEO, gkkworks.

"A general rule, as long we can be true to our vision in terms of serving our clients, we will do the work."

Praful Kulkarni, president and CEO of **gkkworks** (Irvine, CA), a 270-person planning design and construction firm, says that their corporate culture lends itself to working with all industry clients, unless the vision of gkkworks is truly threatened.

"A general rule, as long we can be true to our vision in terms of serving our clients, we will do the work," he says. Kulkarni also believes that the issue of divergent political philosophies and/or philosophical disagreements should not matter in the design process.

"Within the spectrum of generally accepted liberal and conservative views, there should not be a concern. This is the American way! Where we would draw a line would be if we had to do something illegal or unethical," Kulkarni adds.

LET VISION GUIDE YOU. When entering into client relationships, the vision of your organization should be used as the standard. Therefore, as you look to choosing new clients, make sure that the vision and goals of each project align adequately with your respective organizational vision. This is the standard for creating healthy, symbiotic professional relationships that create the space for the next generation of design to emerge.

A new recruiting philosophy

Listen to your staff, have an appealing culture, hire selectively and keep your employees for the long-term.

Ed Friedrichs

FROM THE CHAIRMAN

I'm hearing more and more about the market firming up and people being in demand. So, I think it's a good time to be talking about recruiting; particularly to note that recruiting has two sides to it – the firm seeking someone to help with their increasing workload… and the firm from whom the person is being recruited. If your business has turned up, your workload is mounting and you need to add talented professionals; other firms will as well. Don't forget the care, feeding and nurturing of the people who are already part of your team. Remember, if the market has improved, someone is probably after your brightest and best.

Let's lay out some fundamentals of a recruiting (and its corollary, retention) strategy. First, you need to find out what it's like to work in your organization. Remember, your current team members talk to their friends about what their work experience is like. Your best recruiting resource is your own staff. When they're happy enough with the experience they're having, they reach out to their friends.

If you don't know what they're saying, here's a way to find out. The Gallup Organization published a book several years ago titled, "First Break All The Rules." It contains 12 key questions that determine if members of an organization are"deeply engaged" in their work. This is Gallup's key determinant for how effective they are for an organization's clients, how committed they are to the team that they're part of and, by extension, how resistant they are to being recruited by another firm. Buy the book. Read it. Use the 12 key questions as a survey tool. Use "Survey Monkey," an online free service or, after September, Gallup will be able to support this online as well.

Now let's take it a step further. Do you know what your firm "culture" is? Every firm has a culture, whether you've recognized it and documented it or not. Have you identified the cultural characteristics that, if true for your firm, would make for a place that you and the people you're trying to attract would be proud and excited to be a part of? Remember, potential recruits will ask people what it's like to work in your firm. They'll find out, whether it's from people in your firm, contractors and subcontractors, consultants you work with, or someone else who interacts with you.

If asked, can anyone in your firm respond with a lucid and compelling description of your culture? Even if your culture has not been fully established, is it something the people in your firm honestly believe you're striving toward? Your cultural characteristics can be powerful attractors to people you're trying to recruit (or another firm's powerful draw when they're trying to recruit someone away from you).

Remember, people don't join a firm for money or title. They may find a specific position or project opportunity compelling but, at the end of the day, it's the soft stuff that will sway them… and it's what will keep them.

Now let's move on to how selective you should be about new candidates. I favor a high level of selectivity, no matter how crunching your workload is. Do not ever hire a warm body just to get the work out the door! Consider every new member of your firm as someone you would like to have with you forever; someone who will contribute a high level of value to your clients and the people they work with.

See ED FRIEDRICHS, page 9

I hope these thoughts help you avoid the trap of recruiting and hiring based on a résumé. Credentials rarely predict success in fit, performance or longevity, and they have nothing to do with whether the candidate will be attracted to your firm or not.

‘Potted plants’

Protecting your employees at a deposition should be a given.

WILLIAM QUATMAN

GENERAL COUNSEL

It was Oliver North’s lawyer Brendan Sullivan who once argued, “I’m not a potted plant. I’m here as the lawyer. That’s my job,” during congressional hearings on the Iran-Contra scandal. But a recent New York case suggests that, in some situations, lawyers defending their clients are not much more than a potted plant.

Here is the situation many design firms run across. There is a lawsuit between the project owner and the contractor, or maybe it’s a contractor and a subcontractor. Your firm was the prime designer and you have lots of project records, plus fact witnesses employed by you. Since your firm is not a party to the case, you are served with a subpoena ordering one or more of your employees to appear for a deposition. First, it’s a hassle since court rules only require a minor fee be paid to the witness for his or her time and mileage (nothing close to what your firm loses each day the witness is out of the office testifying or reviewing records). But second, does your employee need a lawyer to accompany him or her to the deposition?

You bet they do, and here’s why.

If you take a lax view about a third-party deposition, thinking your firm is not a party to the suit – so who cares; think again. The two lawyers (or more) who are questioning your employee, under oath, often on videotape, may be setting the stage to join your firm to the lawsuit. In other words, in the process of examining the witness, evidence may come out that implicates your firm as a contributing cause to the loss or damage. If the court deadline has not passed for joining third-parties (and you should inquire about that), you may find that shortly after the deposition testimony a “third party petition” is filed to add you to the suit. You are at an immediate disadvantage because: 1) all of the other lawyers have a year or so in the case and your lawyer is playing catch-up; 2) they’ve all had time with the judge, and you are the newbie; 3) your employee was just recorded on tape making statements that hurt your case, and it’s out there as a permanent record; and 4) you are “fresh money” – and everyone loves having a new player bring their checkbook.

So, back to the potted plant. If you are smart, you or your insurer will retain a lawyer to help prepare your employee for a deposition (what to expect, how to handle yourself, etc.); and to object to improper questions. But wait a minute! Can your lawyer object – or even speak – at a deposition if your company is not in the lawsuit? A recent New York case puts this in doubt. In the case of *Thompson v. Mather*, 70 A.D. 1436 (N.Y. 2010), a patient sued her doctor for malpractice. During discovery, the plaintiff’s treating physician (not the defendant) testified at a deposition. The physician’s insurer hired a lawyer to attend the deposition, during which the witness’ lawyer objected to some questions as to form and relevance. The plaintiff’s lawyer objected to the participation of the physician’s lawyer, suspended the deposition and asked the court for an order that the witness’ lawyer could not make any objections except as to: 1) attorney-client privilege; and 2) abusive or harassing questions. The court agreed and ruled that, “counsel for a nonparty witness does not have a right to object during or otherwise to participate in a pre-trial deposition.” The case has caused a stir in the New York legal circles.

A 1977 Missouri case had a similar ruling in a criminal setting. In *State ex rel. Naes v. Hart*, 548 S.W. 2d 870 (Mo. App. 1977), a woman was charged with stealing. Her lawyer served notices to take depositions from several doctors. The first doctor brought his own lawyer to the deposition who announced that he planned to participate actively in the deposition, which he did by

See WILLIAM QUATMAN, page 8

If you are smart, you or your insurer will retain a lawyer to help prepare your employee for a deposition (what to expect, how to handle yourself, etc.); and to object to improper questions.

ED FRIEDRICHS, from page 6

How do you determine whether someone has this potential? I happen to be particularly interested in a person's communication skills. There are no "Lone Rangers" in the design professions today. Leadership and collaboration are necessary at all levels. When I was speaking with a candidate for a firm recently, I asked a question that is on top of my list for anyone I interview, "How did you become who you are?" What I'm looking for when I pose this question is who and what their life influences were. It's similar to asking, "Who were the mentors who influenced you?"But putting it this way opens the door to a deeper, richer discussion. I'm looking for and usually get stories about family and friends, influences from childhood on.

Most people's values, ambitions and curiosity are formed at a very young age and rarely change much. This candidate told me about her parents and family life, giving me an immediate picture of what had made her a highly self-reliant, entrepreneurial and ambitious person, someone I'd bet on for the future. By contrast, over the years I've heard some tragic tales of very empty childhood experiences that have made a person bitter and cynical. It doesn't take me long with a candidate to have a pretty clear picture about whether the person is looking for a "job"or a "career." Look up the definitions of each in Webster's and tell me which you'd prefer in a candidate. You'll also learn from the way the person articulates their stories whether they have a command of the English language that will allow them to evolve as decent communicators and whether their influential experiences involve collaboration.

Not everyone needs to be able to stand up in front of

> Your best recruiting resource is your own staff. When they're happy enough with the experience they're having, they reach out to their friends.

500 people and deliver an inspiring presentation that results in a standing ovation. But hiring a designer or an engineer who can't present his or her ideas coherently and compellingly, one who expects that their beautiful drawings or brilliant engineering solution are going to cause the world to beat a path to their door, is on a fool's errand. Today's world is collaborative, requiring everyone, even engineers, to be able to "sell" an idea convincingly – to an architect, an owner or a contractor. It requires the ability to negotiate a great solution in the face of a team with disparate values and priorities.

I hope these thoughts help you avoid the trap of recruiting and hiring based on a résumé. Credentials rarely predict success in fit, performance or longevity, and they have nothing to do with whether the candidate will be attracted to your firm or not. More importantly, I hope these thoughts help you keep the great talent you've worked so hard to bring to your firm.

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making objections to questions and even asking questions of other witnesses who were deposed. The defendant's lawyer protested that, as a nonparty to the suit, the lawyer could not take such an active role. The court ruled that his conduct was out of line, since his client was a mere witness and not a party to the suit." A deponent is entitled to access to legal advice on the subjects of privilege and self-incrimination in connection with his appearance" at a deposition, the court held, "as a matter of essential fairness." However, that lawyer may not make general objections, nor observations or remarks "on the record" related to relevancy or any other matter not relating to privilege or self-incrimination, the court said.

So, potted plant or not? Case law appears to permit a nonparty's lawyer to appear and object on these limited grounds: 1) self-incrimination; 2) attorney-client privilege; 3) questions that violate any court order; and 4) clearly improper, abusive or harassing questioning. Other than that, keep your mouth shut!

Next time you get a subpoena for one of your folks to show up at a deposition, should you send a lawyer… or a nice plant? I'd opt for the lawyer.

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practice so all employees receive the "Enermodal standard" of high quality office space and focus on sustainability. However, it is also important to allow individual offices to create meaningful goals and incentives for their own location. For example, as a suburban, car-oriented community, alternative commuting incentives such as $1,500 to $3,000 off the purchase of hybrid vehicles for employees are more relevant to the Kitchener office location than the Toronto office.

> "Because communications between team members and clients is so important to the design process, our initiatives enhance effective team communications and interdisciplinary collaboration within internal and external teams."

RIGHT NOW

The internal selling challenge

Before an opportunity slips through the cracks to a competitor, make sure your firm is offering all the services it's fit to offer.

By LIISA SULLIVAN
Correspondent

Are you selling services internally? If so, are you struggling with it? How do you do it? One firm offers a four-pronged approach, another suggests eliminating the need altogether, and yet another is implementing systems to make cross-selling more effective.


Grant Autry, Operations Director, Hillis-Carnes Engineering Associates, Inc.

Grant Autry, operations director at **Hillis-Carnes Engineering Associates, Inc.** (Annapolis Junction, MD), a 235-person consulting engineering firm, explains that Hillis-Carnes does a good job of selling its different services internally, but is always looking for ways to improve the system and become more effective at capturing a broader range of services for a specific project or client.

"In general, we use four methods to help sell our services across service lines and geographic locations. All four of these methods are tied together in our marketing, business development, and strategic plans," Autry says.

Autry details these four methods:

1) **Cross-training.** "We try to cross-train our professional employees in the various services we offer (geotechnical, environmental, structural forensics, construction materials testing and inspection, and specialty geotechnical construction)," he says. "While we do not feel our staff needs to be fully versed in all of the nuances associated with each service line, having a good understanding of what types of services we offer, how they are executed, and where opportunities for these services may lie help all of our staff to cross sell all of our services when interfacing with a client or potential client on a project." When discussing a potential or current project with a client, Hillis-Carnes always strives to "package" its services together, emphasizing the benefits to the client and project team.

2) **Face-to-face meetings.** Weekly meetings with the managers and business development staff to discuss project pursuits, client initiatives, current and new projects, and any additions to the firm's capabilities and experience profile are key. "By having regular open discussions about the activities of our groups, we are able to exchange ideas and potential opportunities and plan how to best leverage our expertise to cross sell our services," Autry says.

3) **Internal management and tracking system.** "This allows us to follow all of our proposals, projects, and potential opportunities," Autry says. This system contains internal "prompts" for the business development and management staff to alert them of potential cross-selling opportunities when a new item is entered into the system, and provides detailed information on the opportunity and appropriate dates to follow-up.

4) **Company culture.** "This is the most important tool for us to sell our services internally," Autry says. "Our company culture emphasizes project performance and client service. By providing the best possible service to our clients, we work toward creating a partnership where we are seen less of a service provider and more of a consultant that can effectively and efficiently satisfy multiple facets of a project for the benefit of the client and the entire project team."


Nathan Beil, President, KCI Technologies.

RESTRUCTURING LESSENS PROBLEM. Nathan Beil, president of **KCI Technologies** (Sparks, MD), a 1,100-person multi-disciplined engineering firm that operates across the Eastern and Southwestern U.S., says that in order to improve its ability to cross-sell, the company decided to work to eliminate the need.

"Cross-selling was always an area we struggled with," Beil says. "As a result, three years ago we reorganized the firm from being geographically based to discipline-based. We aligned our services in like terms and cross-selling became automatic. In essence, we recreated ourselves to address the problem of cross-selling. It's just easier to initially line-up our services with how our clients are buying them."

KCI is currently broken down into the following disciplines: transportation, construction, inspection and management, telecommunication/utilities, resource management, site/facilities and environmental engineering.

"The discipline layer is now the primary driver and the geographic layer is now the secondary driver," Beil says. "We've

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GOOD TO KNOW

Firms identify developing a marketing plan/firm-wide marketing standards as the biggest challenge marketing departments face, followed by getting staff to market/sell.

Source: 2012 Marketing Survey, ZweigWhite: www.zweigwhite.com/p-1150-marketing-survey-2012.php.

Targeting the right audience

Sending out a press release is not a shot in the dark; develop a process to reach the right people.

OK, you followed my advice in last month's column and created a press release that is compelling, engaging, and relevant. It will surely capture the attention of editors and reporters! Job well done, right? Well, you're almost there. At this point, it's all about execution.

You've heard marketing communications and public relations professionals say it all the time: Target media lists are the way to go when distributing press releases. In most cases, yes, but really in today's communication world blanket statements such as these really shouldn't be made. Each press release and its distribution tactic should be analyzed on a case-by-case basis in terms of audience preferences. So here's an overview of what you need to know about target media lists and press release distribution services to help you in successfully completing the execution process.

Franceen Shaughnessy

GUEST SPEAKER

The PR catchphrase: Target media lists. Target media lists can help zero-in on key editors and publications that are a direct match to the press release topic and intended audience. Here's what I mean: Your internal client, Paul, said he wanted to send out a release on the latest trend in flooring failures. He's looking to expand his business with building owners and facility managers. You write a compelling and relevant release that aligns with Paul's intended audience. The next step is to build your target media list, making sure that you send it to the right editors and publications.

Begin by researching publications, their audiences and circulation numbers. If Paul provides a name of a few publications, research their audiences and circulation numbers as well. If your firm subscribes to a public relations software program, then you can use that to do your research. However, no worries if you don't have that option. With the Internet at your disposal, it's easy to find potential publications for your target media list. When I am researching new publications, I start with multiple keyword searches on Google, which always generates some good options.

When you have a list of potential publications, visit their websites and pull up their media kits. You'll usually find this under the advertising section. Some publications make them available directly online while others require you to email their advertising department. These media kits tell you everything about the audience make-up – from type of audience to the circulation. When building a target media list for a client, I would create an Excel file to store the different publication's audience information. Find information to fill in the following headers for your Excel target media list:

- Publication name
- Frequency
- Media type
- Reach
- Target market
- Circulation
- Editor's name
- Editor's contact info (email and phone)
- Website address

Additionally, under the publication's name header include the name of the company/organization that owns that particular publication. You want to be aware of any sister publications within an organization. With this Excel file, you'll have an easy-to-read snapshot of relevant information for each publication to help you decide on your target media list. The file allows you (and if necessary your internal client as well) to quickly compare and contrast the different publications' reach and audience composition. In the end, helping to finalize the target media list.

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Each press release and its distribution tactic should be analyzed on a case-by-case basis in terms of audience preferences.

zweigwhite

WHAT'S WORKING

ATI'S NEW FACE | Applied Technologies, Inc. (Brookfield, WI), a 40-person environmental water/ wastewater engineering firm, knew it was time for their dated brochure to get a makeover. In an effort to create a piece that best demonstrated ATI's position as an expert and leader in renewable energy and water/ wastewater projects, the firm paired a tagline of "Clear Thinking" and skillfully composed graphics to create a piece that really makes a splash!

After several brainstorming sessions, ATI and Thiel Design came up with an overall campaign to be carried throughout the brochure and into all other marketing materials.

"Clear Thinking encompasses the way ATI conducts business, allowing us to solve challenges throughout the various stages of a project, right down to the drinking water and discharged effluent we produce," says Kim D'Amato, marketing manager.

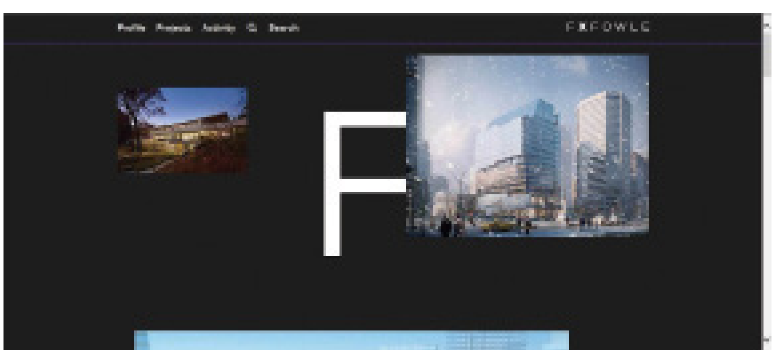
The brochure's central image takes the glass half full symbolism and infuses it with an image of an aerobic basin reflecting an anaerobic digester, two of the firm's most regularly designed technologies. The water glass even contains a spot varnish so that it actually looks wet.

"The collaboration between Thiel and ATI's marketers produced a piece that tells the story of ATI and its differentiators through the use of concise text and well-placed project photos. While this may seem like an obvious strategy, many brochures in our marketplace employ stock environmental photos and an overabundance of text to tell a convoluted story," D'Amato says.

What works:

- Inventive graphics, color scheme, and background (resembling a sparkling pond) convey a sense of water and the environment while maintaining a professional look/feel.
- Focuses on the firm's water/wastewater capabilities and expertise without getting overly technical.
- Pleasant balance between project photos, imagery, and text, directly relates to the people the firm's target audience.
- QR code is a hit with tech savvy viewers

Employees love the new brochures and ATI has continued the "Clear Thinking" theme with new business cards. The firm said they were excited to try the pieces out at upcoming tradeshows.



THE PARALLAX EFFECT | FXFOWLE (New York, NY), an architecture, interior design, planning and urban development firm, recently unveiled a truly interactive website experience – a very effective way to showcase the firm's award-winning designs. The site's homepage features parallax scrolling, the latest in website technology, creating a rich and distinct narrative for each visitor.

"To celebrate and promote our website, the firm organized a panel entitled, 'Interactive Spaces,' as a part of NYCxDESIGN. The panel featured the web designers, Project Projects, a moderator from the Architect's Newspaper, and two partners from FXFOWLE," says Emily Alli, public relations coordinator. "This panel was a great opportunity to discuss our website as a digital work of art, and like our buildings, a living, breathing entity that can transform itself over time."

> "(A website is) a digital work of art, and like our buildings, a living, breathing entity that can transform itself over time."

What Works:

- The main page headers: "Profile," "Projects," "Activity," and "Search" keep it simple while allowing viewers to easily navigate in the direction of the information they are seeking.
- The "Projects" page allows viewers to select various criteria as filters (such as building type or location) in order to view only desired project types. For the curious visitor, the page offers a "random" button that brings up one of the firm's many projects randomly.
- The "Activity" page is kept up-to-date and features a mix of news, blog entries, awards, and other important headlines. The content as well as the fun and easy to read format gives the impression of the firm being modern, active, and relevant.

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Now, it's just a matter of comparing and contrasting the publication's audience and its circulation and balancing those two. Make a note of any editors within the list that you already have a connection with so that you can customize your pitch to your relationships (i.e. you don't want to send a formal pitch if you already have an established relationship with the editor). By following this format, I've created targeted media list that guaranteed key coverage in client-focused publications.

PR DISTRIBUTION SERVICES. As mentioned above, it's important to analyze the distribution of a release on a case-by-case basis in order to see if you need to use just a target media list, a PR distribution service, or both.

Before signing up for a PR distribution service you should be aware of some of its pros and cons.

- **Pro:** It can send out the release to a large batch of online network news websites and publications and, most importantly, index your release on major search engines.
- **Con:** The cost of using the service can be prohibitive.
- **Pro:** It provides that "foot in the door" so to speak to media outlets, giving your organization that key third-party credit with media outlets.
- **Con:** It sends your release to large media outlets but the actual ROI in terms of the relevant clients regarding your firm's expertise who will see the release is not as high.
- **Pro:** It provides you with key analytics on the performance of your press release and helps to boost your website traffic.
- **Con:** You really need to have SEO skills to leverage the online opportunities that it offers.

Considering all of these factors, you next have to look at the overall topic of the release and if it would be relevant to a wider audience that might be more mainstream. If the topic is narrowly focused on something like waterproofing details, then it might be best to just stick with a target media list. However, if you tie that topic into a more mainstream angle that is also a trend, such as environmental concerns, then you might want to consider using a distribution service as well.

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eliminated more of the barriers."

IMPLEMENTING CROSS-SELLING SOLUTIONS TO FACE CHALLENGES. Zeel Patel, vice president, marketing and communications at **Cardno**, Americas Region, an arm of Brisbane, Australia-based infrastructure and environmental services company, says the firm's current philosophy of internal selling, or "cross-selling," is actively supported by leadership and measured in monthly metrics.

"Staff strives to share opportunities across internal divisions when they have awareness of the services and/or staff involved in providing those services. One of our challenges is we don't have systems that enable staff to easily connect to share their expertise. With 8,000 global staff and 4,200 in the U.S., our ability to quickly share information is a critical success factor to enable cross-selling," Patel says.

So, what is Cardno doing to solve this? It is implementing a SharePoint-based Global Knowledge Management system in the coming quarter to connect staff and drive cross-selling. Led by the global corporate team, this effort has been in development for more than a year and has involved stakeholders from around the world. The first phase will enable all staff to share their professional profiles and have those profiles easily searchable. Once implemented, Cardno anticipates a significant increase in its cross-selling metrics.

Patel says that another challenge is to make staff aware of the tools and resources that are already available to them, and then ensure that they use them to sell the company's services.

"For the past nine months, we have had corporate materials for our internal divisions, core industries served and key service lines hosted in downloadable, editable formats on our intranet," Patel says. "Despite the availability and accessibility of materials, many staff lose track of the materials once the launch campaigns are done. To address this, we just started an internal marketing campaign to drive awareness and usage of these materials. In the first month, we've already seen a 75 percent increase in usage."

Cardno is also working on integrating these educational processes into its orientation processes.

"Our focus is to provide a high-level overview of key service areas, but to also teach staff how to look for more specialized information so that our systems work for us as we continue to grow."