



By **Scott Cryer, AIA, LEED AP BD+C | Westlake Reed Leskosky & Joshua O. Hill, AIA, LEED AP | Muse Architects**

November 7, 2014

# Marketing & Business Development

SESSION #2

@ RTKL  
2101 L Street NW, Suite 200  
Washington, DC 20037



# Marketing & Business Development

## PROGRAM SUMMARY:

This session will provide participants a wide variety of insights into the seemingly elusive world of business development, marketing and the pursuit of design opportunities, with the ultimate goal of arming them with the tools to transform themselves into “Visible Experts” in the architecture field. First, a summary of the current state of the AEC industry will be provided, describing how owners are currently procuring work. This will be followed by an in-depth review of the ins and outs of project pursuits and then a presentation and roundtable discussion on the development and cultivation of personal networks. The session will culminate in a summary that will give participants a path toward transforming themselves and their colleagues into Visible Experts in the field.

## LEARNING OBJECTIVES:

1. Participants will learn how to acquire and analyze readily available data from market research of A/E/C procurement and providers in order to drive new business growth, expand current client relationships, and build their firm’s brand.
2. Participants will discover what qualities clients look for in professional services firms and what one trait will tip the scale in their favor, leading to attracting fiercely loyal clients who will make frequent referrals.
3. Participants will learn how to present themselves and their colleagues as Visible Experts, and how to leverage this status to drive significant new growth and profits for their firms using specific tools and techniques to build reputation and ascend to prominence.
4. Participants will be able to evaluate potential opportunities to determine which ones may be appropriate for their team, and then navigate their way through the lengthy proposal and interview process.

## PROGRAM ABSTRACT:

Session 2 of the Christopher Kelley Leadership Development Program will explore the topics of Marketing and Business Development. In the opening presentation, Sylvia Montgomery (Hinge Marketing) will explore the new revolution in the marketplace regarding the highly complex intricacies of procuring and providing professional services. Scholars will discover why there is so much friction between those on the procurement and service delivery sides and what they can do about it, as well as what qualities clients look for in a professional services firm and what one trait will tip the scale in their favor. Scholars will be able to employ skills that will give them a true advantage in the marketplace. The second presentation will be presented by Amy Adye (SmithGroup JJR), and will be an overview of the pursuit of projects. The presentation will address all parts of the process, ranging from how to properly follow-up on a lead to the details of how to put together a winning proposal. Following this presentation, the scholars will tour the offices of RTKL and discuss how critical the workplace environment is in cultivating effective marketing strategies. After the tour, Alison Carney (Balfour Beatty) will lead a roundtable discussion, providing tips on networking and the cultivation of one’s personal network. Roundtable participants including a business development specialist at a major A/E firm, a client/owner and a Principal at a local design firm will explore how they network and why a good personal network helps lead to great business opportunities. Scholars will acquire the skills to begin building their own personal network. The final presentation of the day will empower scholars to become Visible Experts in their field. Sylvia Montgomery (Hinge Marketing) will explore how Visible Experts are able to leverage their status in order to provide significant growth and profit opportunities for their firm. Scholars will discover which tools and techniques are needed to build their reputations and ascend to prominence.

# Marketing & Business Development

**Date:** 7 November 2014

**Location:** RTKL, 2101 L St NW, Suite 200, Washington, DC, 20037

**Time:** 12:00 pm – 5:00pm

## AGENDA

<b>12:00 – 12:20</b>	<b>Lunch Reception</b>
<b>12:20 – 12:30</b>	<b>Welcome</b> by Scott Cryer, Joshua Hill and Laura Ewan of RTKL
<b>12:30 – 1:00</b>	<b>Presentation #1</b> How Buyers are Buying by Sylvia Montgomery of Hinge Marketing
<b>1:00 – 2:00</b>	<b>Presentation #2</b> The Ins and Outs of Project Pursuits by Amy Adye of SmithGroup JJR
<b>2:00 – 2:30</b>	<b>Breakout Session and Break</b> Tour of RTKL Office by Laura Ewan of RTKL
<b>2:30 – 3:45</b>	<b>Roundtable Panel</b> Cultivating your Personal Network moderated by Alison Carney of Balfour Beatty Construction
<b>3:45 – 4:45</b>	<b>Presentation #3</b> Becoming a Visible Expert by Sylvia Montgomery of Hinge Marketing
<b>4:45 - 5:00</b>	<b>Conclusion &amp; Housekeeping</b> Scott Cryer, Joshua Hill & the CKLDP Executive Committee
<b>5:00 – 6:30</b>	<b>Happy Hour @ Stoney's on L</b> 2101 L St NW, Suite 103, Washington, DC, 20037

### III. Speakers & Presentations

#### **Presentation #1: How Buyers are Buying**

Scholars will explore the new revolution in the marketplace regarding the highly complex intricacies of procuring and providing professional services, understanding what qualities clients look for in a professional services firm and what one trait will tip the scale in their favor. Scholars will be able to employ skills that will give them a true advantage in the marketplace.



Sylvia Montgomery, CPSM  
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#### **Sylvia Montgomery, CPSM, Senior Partner at Hinge Marketing**

A specialist in the A/E/C industry, Sylvia Montgomery draws on 20 years experience in business and marketing to help firms achieve growth and position themselves in the marketplace. As Senior Partner at Hinge, Sylvia spends her days running Hinge's A/E/C practice and creating marketing and branding strategies for clients. When she is not speaking at industry events around the country she is spending her time creating thought leadership content and developing new business, Sylvia has co-authored three acclaimed books on marketing and business, as well numerous articles, white papers, and webinars.

Sylvia's leadership positions include Director of Marketing for two civil engineering firms and Director of Marketing Communications at Rubbermaid Commercial Products. She has also led marketing teams at many technology and consulting firms and has served as an adjunct professor at both Trinity College and the George Washington University.

She has been invited to speak at numerous national and international marketing and branding events, including the Society for Marketing Professional Services, the ROG Growth and Ownership Strategies Conference, Society for Human Resource Management, Women in Technology and various executive leadership groups. She has been featured in Architect Magazine's Best Practices Column, focusing on the role of online marketing for architects and NVTC's The Voice Magazine.

Sylvia holds a BA from Trinity College, an MFA from the George Washington University, and an MBA from University of Maryland, University College. She is active in numerous professional services organizations, including the Society of Marketers of Professional Services, and has spoken at various national speaking engagements. She has co-authored many Hinge publications, including The Visible Expert, Inside the Buyer's Brain, Online Marketing for Professional Services, and is a frequent contributor to the Hinge company blog. She lives in Sterling, Virginia with her husband and three dogs and enjoys practicing yoga in her spare time.

#### **Presentation #2:**

##### **The Ins and Outs of Project Pursuits**

Scholars will explore the intricacies of the pursuit of projects. The presentation will address all parts of the process, ranging from how to properly follow-up on a lead to the details of how to put together a winning proposal. Scholars' pre-meeting cover letter assignments will be reviewed and discussed.



Amy Adye, CPSM

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##### **Amy Adye, CPSM, Associate and Marketing Manager at SmithGroupJJR**

Amy Adye is an Associate at SmithGroupJJR with more than 11 years of architecture/engineering marketing experience. Amy currently manages SmithGroupJJR's Washington, DC six-person marketing team, overseeing the proposal and interview process on more than 90 pursuits annually. In addition to leading the pursuit process, Amy also manages dynamic content marketing campaigns, high-end client events and numerous public relations initiatives. Her most recent marketing campaign and client open house won three ZweigWhite Marketing Excellence Awards including People's Choice. As a Certified Professional Services Marketer (CPSM), she is an active member in the Society of Marketing Professional Services (SMPS) Washington, DC Chapter. Amy earned a Bachelor of Science degree in Human and Consumer Sciences from Ohio University in Athens, Ohio.

#### **Breakout Session:**

##### **Tour of RTKL Office**

The Scholars will tour the offices of RTKL and discuss how critical the workplace environment is in cultivating effective marketing strategies.



Laura Ewan, CPSM

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[www.rtkl.com](http://www.rtkl.com)

##### **Laura Ewan, CPSM, Associate, Firmwide Communications at RTKL**

Laura has been with RTKL, a global architecture, planning and design practice, for five years. Transitioning from marketing to a corporate communications focus in 2011, she now leads a creative team of highly-collaborative individuals responsible for maintaining the RTKL brand and managing all of RTKL's internal and external global communications efforts.

An active member of SMPS since entering the industry in 2007, Laura currently serves as Education Director on the SMPS DC Chapter Board. With her background in education, she has taken a strong interest in the professional development opportunities offered by SMPS earning her CPSM in 2011, teaching the DC Chapter's CPSM Bootcamp, and graduating with the inaugural class of SMPS University.

## Roundtable:

### Cultivating Your Personal Network

Alison Carney (Balfour Beatty) will lead a roundtable discussion, providing tips on networking and the cultivation of one's personal network. Roundtable participants including a business development specialist at a major A/E firm, a client/owner and a Principal at a local design firm will explore how they network and why a good personal network helps lead to great business opportunities. Scholars will acquire the skills to begin building their own personal network.



Alison Carney, CPSM

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### Alison Carney, CPSM, Director of Business Development at Balfour Beatty Construction

Working with Balfour Beatty Construction for 23 years, Alison develops relationships with clients, partners and others for the firm's Washington division. With 29 years in the AEC industry, she has been a member of SMPS for many years, serving on committees and the Board; she participates in the mentoring program as well. Alison is a past president of the Washington, DC Chapter.

A Certified Professional Services Marketer, Alison is the 2011 recipient of the SMPS Chapter President of the Year award and 2005 recipient of the DC Chapter's Ginny Solomon Golden Tuba Award. She has served on the board of the Construction Writers Association and committees for the DC Building Industry Association, Virginia Associated Builders and Contractors, Washington Building Congress and Ronald McDonald House Charities of Greater Washington, and both DC and MD chapters of SMPS, among others. Alison earned her B.S. degree in marketing management from Virginia Tech in 1984.



Robert Fox, AIA, IIDA, LEED AP,

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### Robert (Bob) Fox, AIA, IIDA, LEED AP, Principal-in-Charge at Fox Architects

Bob Fox is a leader in the architecture and interior design profession and is well respected by his peers for his open minded and innovative approach to workplace design. He inspires those around him to look beyond the physical environment to consider the broader spectrum of organizational and cultural issues affecting today's workplace.

Bob founded FOX Architects in April of 2003 in Washington, D.C. His firm specializes in architecture, interiors & graphics for the commercial office industry and is focused on providing quality design and dedicated service on every project. In his current role he acts as an advisor to his clients to ensure the strategic objectives and expectations are achieved. The firm is nationally recognized for its consistent balance of design & business.

In 2010, Bob started Work Design Magazine. The online publication provides an independent & unbiased resource for information on the workplace. The magazine focuses on new ideas, products, people and projects that influence the workplace and how people work. Work Design Magazine offers creative ways of thinking about office space and provides a forum for users, experts & design professional to share information, ideas and inspiration.

**Roundtable:**  
**Cultivating Your Personal Network**  
*-continued*



R. William Hard, Principal

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**R. William Hard, Executive Vice President and Principal at LCOR**

Mr. Hard is Executive Vice President of LCOR in charge of operations at the metropolitan Washington, D.C. office in Bethesda, Maryland. He serves on LCOR's Executive Committee.

Mr. Hard holds a B.A. from Lafayette College (1971) and an M.A. from the University of Pennsylvania (1972). He joined the Philadelphia National Bank as Vice President of Real Estate. In 1981, he joined The Linpro Company (the predecessor to LCOR) as Partner, becoming a Vice President of LCOR in 1992, and an Executive Vice President and Principal in 1999.

During his tenure, Mr. Hard has assumed responsibility for the acquisition, development, financing, construction management, leasing, property management, and sale of over a dozen projects including office parks, commercial office buildings, and multifamily rental properties. The most prominent projects in which Mr. Hard has been involved include the U.S. Patent and Trademark Office headquarters consolidation in Alexandria, Va., the acquisition of the COMSAT campus in Clarksburg, Md., the development of North Bethesda Center at the White Flint Metrorail station in Maryland, and Oyster School/Henry Adams House in the District of Columbia.

Mr. Hard is a member of the Executive Committee of the Urban Land Institute's Washington, D.C. District Council. He is an active participant in ULI's Urban Plan and Young Leaders programs. Mr. Hard also serves as Treasurer of the Board of Directors of Hospice Caring Inc., and Chairman of the Real Estate Committee of the Montgomery College Foundation.



Michelle Monnett, Assoc. Vice President

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**Michelle Monnett, Associate Vice President, Business Development, RTKL**

With 24 years of experience in the A/E/C industry, Michelle Monnett specializes in business development for architectural/engineering firms. She recently joined RTKL and is focused on business development, strategic planning, proposal and presentation development and project marketing and development. Her responsibilities include: initiate and develop new relationships with prospective clients; maintain relationships with existing and past clients; develop and implement proposal and presentation strategies; identify, recommend and select teaming partners for pursuits; maintain relationships with past and current partners and consultants; and arrange and participate in meetings and debriefings for business development opportunities and marketing pursuits.

Before joining RTKL, Michelle spent 19 ½ years with AECOM (formerly DMJM) responsible for marketing, business development, strategic planning and business operations.

Michelle is a member of the Washington, DC chapter of SMPS where she has served as committee member, Board member and Chapter President and is the 2008 recipient of The Ginny Solomon Golden Tuba Award. She has also been involved with national committees for SMPS including Chapter President of the Year and served as the Chairperson for the 2010 Striving for Excellence Committee. She is also a member of the Washington Building Congress.

### III. Speakers & Presentations

#### **Presentation #3: Becoming a Visible Expert**

Scholars will explore how Visible Experts are able to leverage their status in order to provide significant growth and profit opportunities for their firm, while discovering which tools and techniques are needed to build their reputations and ascend to prominence.

#### **Sylvia Montgomery, CPSM, Senior Partner at Hinge Marketing**



Sylvia Montgomery, CPSM  
smontgomery@hingemarketing.com  
www.hingemarketing.com

Sylvia has co-authored three acclaimed books on marketing and business, as well numerous articles, white papers, and webinars. The books include: *The Visible Expert*, *How Buyers Buy* and *Online Marketing for Professional Services*. She speaks often on topics associated with growth and professional services. Topics include: Branding your AEC Firm: Counterintuitive Strategies for High Growth; Building a Confident Professional Services Brand; Planning a Marketing Strategy for Professional Services Firms. Her past speaking has taken her to audiences from: Society for Human Resources Management (SHRM), Structural Engineers Association (SEA), Society for Marketing Professional Services (SMPS), National Conference, and ROG Growth and Ownership Strategies Conference, among others.

## Sponsors

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### Acknowledgements

We would also like to thank Laura Ewan and the Washington DC Chapter of SMPS for donating so much of their time and resources to make this session a success.