

2.2 Casting Your Net: Defining Who You Are and Positioning Your Firm for Success

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What You Will Learn in This Chapter

- How to lead a strategic conversation with your firm's leaders.
- How to use an identity map as a tool to lead a discussion about who your firm is relative to your competitors.
- How to specifically define the markets in which your firm works.
- What positioning is and how it works.
- How to position your firm in each of your markets.

Too much of what we do in marketing happens automatically: we do what we've always done, following established patterns and habits in an attempt to repeat our prior successes, without stepping back and considering how what we're doing fits into the larger vision and strategy for the firm. For many firms, the marketing process begins when they receive an RFP. They read about the project, think, "Sure, we can do this," and submit a proposal. They don't consider how the opportunity supports the firm's vision and mission, how the firm is positioned in this market, how winning this project would help the firm, or even why they really want this project. Unless a firm already has a very strong relationship with the client, they probably lose. They're capable of doing the work, but they haven't made a compelling argument as to why they're the right choice.

You're competing in a highly competitive marketplace. If all you've got is the basic capability to do the work, you will probably lose to firms that offer more – firms with expertise or additional capabilities that you don't have. You have to position your firm and be able to say, "We can do this better than anybody else, because..." What makes you the best choice for this project and other projects in this market? Why do you want this project anyway?

In order to determine your overall objectives and how to position yourself for the work that you want to win, it is imperative that you find time to reflect on who you are as a firm, who you'd like to work for, what your markets are, and how you will position yourself in each of those markets. Without really considering these questions, your marketing cannot be truly strategic. If you don't know where your firm is going, how can your marketing possibly be in alignment with the firm's vision and objectives?

The goal of this chapter is to provide a basic overview of how to conduct a conversation with your firm's leaders about who you are as a firm and what the vision for your practice is, and then how to use the understanding that you gain from that conversation to define your markets and position your firm in those markets. This applies to any firm in our industry of any size or age, from the new, one-person consulting practice to the established multidisciplinary giant. While the resources your firm may have to apply to its marketing efforts will likely depend on the firm's size, the basic process of defining your strategy and positioning your firm is the same for any firm.

Having the Conversation: Who Are We as a Firm?

The first thing to consider is what kind of firm you are. This isn't a simple question, as there aren't a finite number of answers, and it's important to be as specific as possible. "We're an engineering firm" isn't an answer that provides much information to guide your marketing efforts. But "We're a structural engineering firm that specializes in the most complex structures in the world" gives you a lot more to work with. So, how do you define who you are?

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If you're a sole practitioner, or a firm that is essentially led by a single person, it's possible for that one leader to define what the firm is about all by himself or herself. However, if you have more than one person in a position of authority in your firm, you will likely need to get the right people together and have a conversation about it. This is often a conversation that isn't easy to schedule, and that can't happen in a formal setting like a conference room. It's a good dinner conversation, at a point when the firm's leaders are feeling reflective for one reason or another, often when there's some organizational challenge or pending change that the firm is struggling with.

In order to be most effective, it's important that the conversation happens with a small group, ideally no more than eight people. If you're in a firm with 60 principals, you'll need to pick a few key leaders to include in the conversation. With a group larger than eight, it can become difficult to guide the conversation, and the group can have a difficult time reaching consensus. Since each member of the group that you've assembled is an important leader in your firm, the answers that you come up with in your session can only be successfully put into practice if they are embraced by everyone in the room. For that to happen, the conversation needs to be carefully led to achieve consensus about what is discussed. Here are a few ground rules for creating a consensus-building atmosphere in a group:

- The topic of conversation needs to be guided carefully, and it has to be clear to everyone what you're talking about and what your purpose is. This can be done by asking questions of the group ("So, what kind of firm do we want to be?") and by making provocative statements that illicit a response ("So, we're just a me-too player, right?").
- Everyone needs to feel comfortable and be encouraged to speak frankly.
- There are no bad ideas; all opinions are valid. Any negativity ("That won't work!") has to be kept to a minimum, in order to let the person with the idea get it out.
- The rest of the group has to listen attentively to what each member of the group says. There can't be side conversations (which is much easier to prevent in groups smaller than eight).
- Disagreements need to be discussed and resolved when they come up.

Whatever planning your firm has done previously can form a good basis for this discussion. If your firm has a business plan or a strategic plan, that should provide a good place to start if the leaders of your firm take the plan seriously and are invested in it. If they don't know the plan or don't take it seriously, that indicates that you have a truly urgent need to have this conversation! Depending on how your firm has developed its business plan, it may contain some indication of target markets, financial goals, and hiring and staffing strategies. All of this can be helpful in the discussion about what kind of firm you are.

You may want to begin the conversation by asking each person in the room to say how he or she describes the firm to friends or colleagues (not to clients or prospective clients – you don't want to know how they sell the firm, but how they think of it). Depending on what kind of setting you're in, you may want to write a few key words down on a surface that everyone can see – a flip chart or large piece of paper or a computer attached to a projector. Once everyone has had a chance to speak, you may want to ask, "Does everybody agree with this?" Then probe whatever seems most interesting or whatever topics the people in the room do not seem to be in agreement about.

In the discussion of what your firm is really all about, don't be afraid to let the members of your group get personal, even a little bit selfish. The vision for the firm should be the shared vision of this entire group. It should reflect their passions and the things that are most important to them. The questions "Who are we?" and "What are we all about?" shouldn't be addressed lightly, nor without a little soul-searching. The answer needs to represent a firm that everybody in the room is proud to work for.

The following are a few key questions that can form a rough agenda for your discussion (or questions to think about if you're a sole practitioner or the sole leader of your firm) – and the answers can provide the basis for the development of an overall marketing strategy, including your positioning in each of your markets:

Who are we?

What makes us who we are?

It is important that the key leaders of your firm are in agreement about who the firm is and what it stands for. What do the leaders of the firm believe in? What is the firm known for? Is your firm a design-based practice, known for your signature design style that can be applied to many kinds of projects, or is it a specialist practice, expert in the design of a specific type of facility?

What's our vision for the firm?

Who do we want to be?

Your vision statement is an expression of what your firm aspires to be. This is the place to use superlatives: best, leading, largest, most, finest. In your wildest fantasies, what is your firm all about? Design? Innovation? Efficiency? Service? How does your work improve the lives of your clients? How does your firm change the world for the better with every project? A vision statement could be something like this:

AB&C is a design firm that improves the lives of hospital patients and medical professionals by taking a fresh look at healthcare design and applying the best practices from around the world to our projects.

Try to express your vision statement as concisely as possible. Write it out first and allow it to be as long as it needs to be, and then cut things that aren't critical. Try to get it down to one key idea. Make it as active and as ambitious as possible. Here's an even better vision statement:

DE&F designs the most successful hotel and resort properties in the world.

It can be very challenging to write a statement like this in a group. You may not get to your final answer in the discussion, but try anyway. Begin with a blank piece of paper. Ask the group to throw out words that describe what they think the firm is, at heart, all about – not the realistic, earthbound stuff, but the truly aspirational and inspirational. How do you impact the world?

Once the ideas start rolling, you'll be able to see which ones rise to the top. After you've accumulated enough raw material, prompt the group to pick what they think the absolutely most important things are; then take a pass at writing down the vision statement. Ask the group to edit it. Move on when you feel that you've accomplished all you can in the meeting. You may need to rework it after the meeting and send it out later for the group to review.

What's Our Mission?

What Do We Want to Change? Where are we going?

A mission statement is much more directed than the vision statement. It describes not who you are as a firm, but where the firm is going. It describes how you plan to change your practice – not the world. Think big, but create a mission that is practical and achievable. Here's a sample mission statement:

We intend to transform our company into the most respected laboratory design firm on the west coast. We will accomplish this by hiring the best staff, rigorously improving the quality and accuracy of our design, and delivering on our promises.

Start developing your mission statement by asking the question, “Where do we want to go now?” Is there an existing market that you'd like to penetrate further? Is there an area of your practice that you'd like to improve? Be as specific and focused as possible.

Just as with the vision statement, recognize that you may not be able to complete the mission statement while you're in the meeting. Everybody may need to give it some thought. Let it go when you feel that you've gone as far as you can. Remember that what's most important isn't producing a neat and tidy plan, but the process of working together with the key minds in your firm to discuss and reach agreement on key issues.

What do we want to be known for?

What do we do better than anybody else?

By asking the leaders of the firm what they want the firm to be known for, you are getting at the firm's branding, without using the word “branding.” In our industry, your brand (how your audiences perceive your firm) is essentially your reputation. Many firm leaders have some resistance to the word “branding” because they have associations to the world of product marketing (think Coca-Cola or Target) or because they think of branding as logo design. Using the word “reputation” or asking your firm's leaders what they want the firm to be known for can be a more direct route to the same information.

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What do we like to do most?

What are our passions?

One often overlooked factor that can distinguish your firm from your competition is your passion. It is very important to identify the passions of your firm's leaders and to find ways to pursue and engage them. Your passion shines through to others, and will be apparent to your clients. When pursuing a project, your enthusiasm and commitment can make a huge difference in influencing a potential client to hire your firm. Because of this, you'll be more successful pursuing work that you care about than work that you don't.

Who are we competing against, and what makes us different?

How are we unique in our markets?

In your discussion, feel free to talk about other firms as models or benchmarks. "We're like Big Firm A, but we're smaller and more focused." "We're like Small Design Firm B, but our design style is more driven by the client than our own tastes." These comparisons help you to categorize your firm and to figure out where you fit within the solar system of your competitors.

An *identity map* is a great tool for exploring how you compare with your competitors. Select two factors and map one on the X-axis and one on the Y-axis. (The example shown here uses size and generalist/specialist as the two factors.) Put your competitors on the map and put your own firm on the map, in order to establish a common understanding of how you compare.

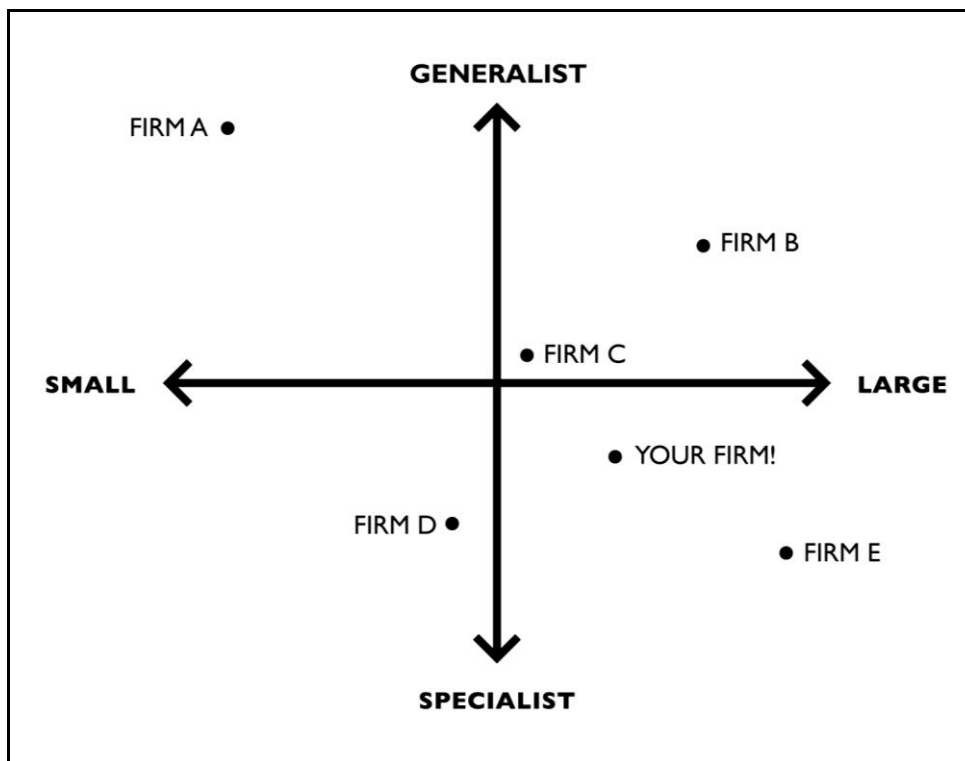


Figure 2.2a Identity Map

Here are a few factors that you may want to use to create an identity map (either as the X-axis or Y-axis) or that you may want to talk about with your firm's leaders:

Generalist vs. specialist firm

There are both advantages and disadvantages to the strategies of being a generalist or a niche specialist. A strategy of *generalization*, of pursuing work in a number of markets, can enable the firm to grow through pursuing new kinds of work and is often more stable, as the downturns in one market may be offset by opportunities in others. A strategy of *specialization*, of pursuing work in one or just a few markets, while not usually enabling the kind of growth or long-term stability of the generalist strategy, can be incredibly profitable. If your firm “owns” a market – that is, you're the obvious leader in that area – a lot less time and money are required to bring in new work, and your firm's profitability can soar.

Client driven vs. market driven firm

Some firms grow by focusing on a limited number of existing clients and seeking new opportunities to provide services to these clients. Other firms focus less on existing clients, but may focus on growing through increased penetration of one or more markets. Truly successful firms do both of these well – servicing existing clients and gaining a majority of their work through repeat business, while growing by acquiring new clients in markets in which the firm has some expertise.

Design vs. execution focus

Depending on whether you are an architect, an engineer, a specialty consultant, or a contractor, you may view your firm as being more concerned with design (the big idea, the vision, providing the solution to the client's challenges) or execution (completing the project successfully in a way that meets the client's expectations with few surprises and minimized risk). Clearly, some large firms try to emphasize both design and execution. But it can be an important anchoring question to discuss with your firm's leaders whether they see themselves as more about design or more about execution.

Unique vs. “Me too” player

What makes you special? Are you a unique firm, with a unique approach or perspective, or do you see your firm as being one of the pack?

Defining and Understanding Your Markets

Once you have built some common understanding of who you are as a firm, get a little more specific and define your markets. Most firms define their markets somewhat vaguely (“We're in the education market”). It is very helpful to define your markets as clearly as possible so that you can make better decisions about opportunities (whether a project opportunity, a press opportunity, a new strategic relationship, etc.) as they come up.

Markets are defined by four factors: *service*, *client industry*, *facility type*, and *geography*. You could, for example, determine that your market is the interior design (service) of retail locations (facility type) for fashion companies (industry) in the western United States (geography). A firm that defines its markets very clearly might say, “*We provide construction services for academic institutions in the Midwest, with a special emphasis on dormitory projects.*” By defining your markets clearly, you can have a common understanding among your firm's leaders that will enable you to more easily make decisions when an opportunity comes up.

With your group's help, list the markets you currently serve on each sheet. It's okay to list markets that you're hoping to move into, but make a clear distinction between the markets your firm works in now, and the markets you're targeting.

Services We Provide	Client Industries	Facility Types	Geographic Reach
Architectural Design	Academic	Classrooms	New England
Engineering	Government	Data Centers	Mid-Atlantic States
Planning	Aerospace	Laboratories	Midwest
Interior Design	Media	Offices	Asia
Construction	Fashion	Retail Stores	Canada

Table 2.2a Sample Markets

In this example, the firm is in five (highly unlikely) markets: architectural design for academic classrooms in New England, the engineering design of government data centers in the mid-Atlantic region, etc.

Look at the listing you've made. What does it tell you? Are you highly diverse? Do you have a strong market niche? Where are the areas for investment and growth? Are there key areas in which you are clearly the leader? Are there markets that you believe that you serve better than anyone else? Build a consensus from your planning group of which markets are core to your practice and which markets are more exploratory or opportunistic in nature.

Understanding Your Current Position

Positioning is the process of clearly defining your firm relative to your competition in a specific market. Your position is where your firm is starting from when you enter a selection process for a new project – what your clients and potential clients think of your firm before they open your proposal or invite your firm to an interview. What do they know about your firm? What do they think of your work? How is your firm positioned in this market? Is your firm the leader? The underdog? A newcomer?

Now that you've identified and defined each of your markets and talked about how important each market is to your firm, begin an in-depth discussion of each market, exploring the competitive landscape and your current position. Depending on where your initial discussion with your firm's leaders takes you, and how many markets your firm is in, you may want to have this conversation at another time or with a different group of people (you may, for example, want to have the a conversation about the education market with a group drawn from the people in your firm who work on education projects).

You may want to begin this conversation with a review of the market: its definition (again in terms of service, client industry, facility type, and geography), the size of the market, who your clients are, your portfolio, your sales history, overall revenue, profitability, etc.

Consider the competitive landscape carefully. Is another firm the clear leader in this market? Are there competitors that are truly formidable across the board? Are you coming up against the same competitors all the time? Make a list of your key competitors and discuss the strengths or weaknesses of each. How are they perceived in the marketplace?

Once your discussion group understands the market, history, and competitors, a SWOT analysis (strengths, weaknesses, opportunities, threats) is a very good discussion tool for getting a picture of your current position in a specific market. SWOT is discussed elsewhere in this book, so we will not go into significant detail here. Sometimes a SWOT analysis is used as a tool for a broader discussion (as in, a SWOT analysis to explore a firm's current situation), but we'll use it in this context to discuss a specific, well-defined market in detail.

Divide a piece of paper into four quadrants and label these strengths (upper left-hand), weaknesses (lower left-hand), opportunities (upper right-hand), and threats (lower right-hand). The left side of your paper (strengths and weaknesses) is internal, issues within your company. The right side (opportunities and threats) are both focused outside: what are the opportunities out there that you can take advantage of, and what are the threats that you need to watch out for?

What are our strengths in this market?

What's special about us? What makes us great?

Start with your strengths. What are you really good at? Is it your design? Your service? Some special knowledge or expertise? List the factors that you consider to be your strengths, but focus on those strengths that are truly unique. A generic strength such as “We're responsive to clients” is something that any service provider in business today should be able to claim, so keep strengths like this off the list. Brainstorm with your planning group until you come up with a list of strengths that feels complete to you.

What are our weaknesses in this market?

What could we do better?

It is very important to be honest about your liabilities. What are the things that you don't do as well as you could in this market? List everything that might affect your performance, or the perception of your firm's performance, both internally and externally. Establishing an understanding of your weaknesses is the first step to overcoming them and can also help you to see what you are truly good at, in order to minimize the amount of time spent chasing opportunities that will be difficult to win.

What are our opportunities in this market?

How can we grow?

Identify opportunities in your market for growth, expansion, or developing greater depth in existing areas. What's changing in this market? Are there any broad social or economic trends that you can capitalize on to achieve growth? Given how tightly defined the market is (in terms of service, client industry, facility type, and geography), are there opportunities to expand any of these? Are there new services that could be offered, a broader geographic area that could be explored, or a new facility type that your firm could design?

What threats do we face in this market?

What scares us?

Threats are factors in the marketplace that could hurt your current position. If you can be honest about the threats your firm is facing, this information will be invaluable in planning your future direction. What are your competitors doing that threatens your position in this market? Is your firm facing new competitors? Are there trends in this market that have the possibility of affecting your business negatively? What keeps you up at night?

Once you have this in-depth discussion, it may be helpful to talk to some clients and prospective clients that you know (or someone in your firm knows) personally to validate what has been discussed here. Ask the client or prospective client about what they perceive your firm's strengths and weaknesses to be in this market and try to identify any opportunities or threats that you didn't identify in your discussion. Pay special attention to any untapped needs that are not being met by your firm or its competitors.

After validating the SWOT analysis with a few conversations with clients and prospective clients, you should have a clear impression of your current position in your market. How do you fit in? Are you a leader or a follower? Are you perceived as a veteran, an underdog, or a newcomer? Are you unique in some way, or a “me too” player?

Developing Your Position and Moving up the Ladder

If you're like many firms, there are very few markets in which you can truly consider yourself the leader, yet in your discussion you probably acknowledge that you would like be the leader in more markets. There are real advantages to being the leader in a market: You're associated with the market and you can usually charge higher fees than the competition. So how do you get to be a leader?

In their landmark marketing book *Positioning: The Battle for Your Mind* (McGraw-Hill, 2001), Al Ries and Jack Trout claim that people create associations and "positions" in their minds for things because we're simply overwhelmed with too much information and trying desperately to organize it in some way. Ries and Trout describe positioning in terms of ladders in the audience's mind: Each ladder is a market. Each rung is a brand. Where a brand fits on the ladder is its positioning. Imagine what the positioning ladder looks like for cola drinks. Rung 1: Coca-Cola. Rung 2: Pepsi-Cola. Rung 3: RC Cola. Rung 4: Everybody else. Once the arrangement on the ladder is set in the mind, it's very tough to improve your positioning and move up the ladder. Even though Pepsi generally wins in blind taste tests, it can't knock Coke out of the top position. If you're competing in the sports arena design market against HOK Sport Venue Event, you may be able to beat the firm on one project, but it's going to be very difficult to knock it off the top rung of the ladder. It's probably going to be the first firm that your client or prospective client thinks of when they think "sports arena design," and there's not a whole lot you can do about that.

Why is that? How did HOK Sport Venue Event get on the top rung of the ladder? How do you get to be on the top rung? The easy way is to be the first one there. HOK Sport Venue Event was the first firm to say, "Sports arenas are what we do," and it locked that idea into our minds by making its name reflect its specialization and by backing it up by designing a lot of sports arenas.

It's nearly impossible to get to the top of an existing and established ladder where there's already a firm that is identified as the leader in everyone's mind. Sit back, be patient, get used to being number two (or three or 17), and wait for the firm ahead of you to die. This can take years or a truly monumental error on its part. Andersen was on the top rung of the accounting ladder before it mishandled the Enron account. Spectacular failures like this are rare, but they do happen.

So while it's very difficult to climb an existing ladder and knock another firm off (because it's their ladder and they were there first), new ladders are actually created all the time. Define your own market so that you can be the first in it!

For example, you may not be able to overtake HOK Sport Venue Event's positioning in sports arenas, but what about concert and event venues? Is HOK Sport Venue Event on the top rung of that ladder? What about smaller sports arenas – Little League parks, high school football fields? Which firm is on the top of that ladder? What about specializing in arenas for a single sport? Is HOK Sport Venue Event on top for soccer fields? Maybe it is, but if you're positioned as the specialist for soccer fields, even HOK Sport Venue Event's highly focused positioning can start to seem broad if you're competing for a soccer field.

The challenge is to define your market (your ladder) as specifically and concisely as possible so that people can accept it as a unique market, remember it, and associate your firm with it. For models, look at the architectural marketplace. How many "top rung" design firms can you name? Rockwell in restaurants, Gensler in interiors, SOM in high-rise buildings, WATG in hotels, and on and on.

In Chan Kim and Renée Mauborgne's book *Blue Ocean Strategy* (Harvard Business School Press, 2005), they define "blue oceans" as new markets that are free of competitors. One of their key examples is Cirque du Soleil, who created a new market (a new "ladder") derived partly from circus and partly from a number of theatrical forms. Now Cirque du Soleil is on top of their own ladder, the leader in their market, and a number of other "me too" competitors are trying to climb up the ladder to establish themselves in that market.

But we can't all be leaders, and we probably can't be leaders in all of our markets. Followers can position themselves distinctly as well, generally as the lower-cost or higher-service alternative to the leader. Followers can be very successful; think Avis or Pepsi or Burger King. But they seldom overtake the leader. Followers need to be positioned clearly. The Avis slogan, "We're number two – We try harder!" gives the company a firm placement in the mind of the customer as the higher-service alternative to Hertz, the leader in the market. Positioning yourself as an alternative to the leader won't enable you to replace the leader, but it may clearly secure your place as number two.

The process of positioning involves a little more than just creating a new ladder and scrambling to the top of it. What type of ladder do you want to create? How do you define your market and what do you offer it? Why should you choose this market and how will you back up your position as leader in it? Much as your vision statement describes what you'd like your firm to be, your positioning statement sums up your market and your position in it:

"JKL is the leader in the design of intermodal transportation facilities. We [are different from the competition because we] have a thorough understanding of the complex inter-related circulation issues of planning facilities to accommodate people, trains, busses, and cars."

Once you have your positioning defined, you have to spread the word in every form of communication that your firm has with your market, and back up your positioning by consistently delivering on your promise. If you spread your message clearly and consistently and are able to serve your clients well, you'll soon find that your clients are helping to spread the word by repeating your positioning to others.

Many firms believe that a solid positioning limits their flexibility and their appeal. "So what if we're the leader in dormitory construction? We want to build hotels!" Many firms resist positioning at all for this reason. They don't want to be pigeonholed or limited in any way by how they're perceived. A positioning as leader in a market is an incredibly valuable thing. You're in the audience's mind. The followers probably aren't, or at least don't occupy the same level. To attempt to make your positioning broader (or to avoid having a strong positioning at all) limits its effect. Your audiences think, "Can they really be so good in dormitories if they also build hotels?" "I hear they build good dormitories, but they don't seem very focused on that." It's better to be on the top rung of a small ladder than the bottom rung of every ladder. It's very difficult to market a firm that is a jack-of-all-trades. You really can't be all things to all people.

If you're like most firms in our industry, you work in a lot of different markets. You may work on labs and hotels and dormitories and houses. You have positions in each of your markets and you should work on developing them and defining what it is you stand for in each. But accept the fact that you can't be the leader in all of them. This doesn't mean you should restrict yourself to the markets that you're the leader in, just that you should build your leadership position in a specific area and grow your business where you can. Focus on what's most important to you and your business, and position yourself as a leader where it makes sense to your vision and business strategy to be a leader.

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David was the 2005-2006 President of the New York Chapter of the Society for Marketing Professional Services (SMPS) and the 2003 recipient of the SMPS New York Chapter's Marketing Mentor Award. He was the co-chair of the Marketing Committee of the New York Chapter of the American Institute of Architects (AIA) from 2001 through 2004 and has created and moderated a wide variety of programs, panel discussions, roundtables, and lectures related to marketing for the built environment. In January 2008, David was named one of the "40 under 40" in Building Design & Construction Magazine. He is a graduate of New York University (BFA in Dramatic Writing) and Trinity College in Dublin, Ireland (M.Phil. in Irish Theatre). In his free time, David writes plays – two of which are published by the Dramatic Publishing Company.