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# The Entire Business Development Process in *11 Words*

IDENTIFY ENGAGE  
LISTEN  
UNDERSTAND  
RESPOND INFORM

Earlier this year, I was asked to describe the A/E/C sales process to a room full of peers. My initial reaction was, "Sales is a result—business development is the process!" Yes, we're trying to generate sales, but with professional services, that should be considered the preferred culmination of effective and timely marketing and business development efforts.

In a vernacular sense, sales or customers are more transaction-based, similar to retail. Business development is the process of securing clients, and clients are those with whom you have to earn trust before there is any chance of working together. And that process, as you'll be reminded, does not start at the RFP!

That being said, I gathered myself and decided to create a simple list of words that align with the chronological process of what I (and all you other business development leaders out there) do on a daily basis. I wanted to be able to write

these on a flip chart very quickly. I thought of key action words that I execute from Point A to Point Infinity. These words are:

*Identify, Engage, Listen,  
Understand, Respond, Inform,  
Pursue, Affirm, Win, Fortify,  
Cultivate*

That's it ... the 11 words that best describe the entire business development process. Now, let's take them one at a time to clarify what they mean.

## **IDENTIFY**

The first thing we all need to do is identify a prospective client and determine if they're a good fit for your firm (and if they'll eventually have interesting projects). No matter the client or owner organization, somebody must stand up and say "Hey, why aren't we working with them?" We have to start somewhere, right?

Hopefully, you're part of the strategic planning process and there are champions created to establish optimum market share with each top client or preferred vertical service market.

## ENGAGE

This topic usually takes up a half-day discussion in my workshops, but for this article, we'll condense it to two paragraphs. A personal introduction to a prospective client typically happens through a trusted partner or peer (my first choice), a meeting



at an event, or a phone call to share a quick introduction/understanding/offering message (which, if done properly, is not a sales call). Your first action after the introduction is to gain a face-to-face meeting with a decision-maker or influencer.

Until that happens, you have little-to-no opportunity to develop a meaningful, trust-based relationship. From the moment you get a prospective client on the phone or start your first conversation, you need to stay away from coming across as salesy or pitchy.

## LISTEN

Once you're engaged and in front of your prospective client, you clearly want to organize the conversation around your phone call or whatever inspired them to set the meeting. It may sound cliché, but listening is your most important activity. You got the meeting because you weren't selling on the phone, and you'll have a productive first meeting if you don't start asking for work during your conversation. This is the first of many opportunities to listen and learn valuable tidbits. Make the client



**Make the client comfortable and they'll talk, talk, talk!**

comfortable and they'll talk, talk, talk! That's a good thing because just about everything they share can and should be used in the future to develop the relationship.

## UNDERSTAND

Just as important as being listened to, clients want and need to be understood. From the first meeting and beyond, you need to make sure you fully understand their goals, interests, ideas, likes, and dislikes. A great way to prove that you're actively



listening is to constantly clarify. "So what you're saying is...", or "Just so I'm following you..." or "That's very interesting, tell me more about..." Building the foundation of trust with clients begins with showing them you truly understand their perspectives and concerns. The better you understand them, the better you can do what comes next.

## RESPOND

Whether it's during your initial meetings or as part of a follow-up regimen, you must now start the effort of doing what you say you're going to do. For any information, introductions, or activities that you've offered, you must follow through exactly as you promised ... if not better or faster than anticipated. Remember, responsiveness is a regularly used word, good or bad, when you're executing your client feedback/performance review meetings (face-to-face, please) about ongoing or completed projects. You should place the same importance on that effort during this courting stage as well. Meaning, it never goes away!





## INFORM

The best business developers aspire to excel at the role of consummate informer. You want to have the reputation with your clients that you're always looking for opportunities to enlighten them with industry trends, interesting events, or recent lessons learned. The reputation of consummate informer can usually turn into one of trusted advisor. That's the ultimate position you want to gain with your clients and, again, it takes constant effort to prove your value and worth to them and their needs.

## PURSUE

This step happens when the right project comes along with your prospective clients and you decide to go for it. Hopefully, you've already completed your go/no-go process. If you don't know all or most of the project drivers and selection committee hot buttons by now, it's typically too late to create the most productive message. This means you'll have to guess, and that's not a healthy strategy.

During the pursuit stage, the entire team needs to be engaged. Business development, marketing, and the design or project management team must be fully inspired to win this project by (1) understanding all the client's issues; (2) caring about the impact of the project to its users; and (3) knowing that at this point, qualifications only got you here ... they won't win the project. Inspire your audience to want to work with you, not your résumé!

## AFFIRM

This goes alongside the pursuit phase, but is too often forgotten. From the first paragraph of your proposal's cover letter to the closing statement of your presentation, sprinkle as much of the intelligence you've gained from the client since your first meeting. We've already discussed the importance of listening, understanding, and responding. Now you can prove you've listened by acknowledging what you've

learned they care about the most; affirming how you will help make their vision happen; then affirming why your people, culture, and process match so well with theirs.

## WIN

This is the goal you've been looking for ever since you decided (a long time ago) that you wanted to work with a new client. If you've followed the previous steps conscientiously, you'll likely get the results you're striving for. I've often shared that the most applicable evaluation criteria for a business development effort is hit rate. It's really the best thing to determine effectiveness.

I've also frequently shared that the three elements that impact hit rate the most are: (1) an effective due diligence effort before the RFP; (2) an honest go/no-go process (this is sometimes tough to get technical folks to stick to); and (3) a proposal and presentation effort that's focused on the audience (the client, the purpose of the project, and the project's users) and not on your firm.

After a win—call it a sale if you want—you'll know it happened because of the process you've executed well before the RFP hit the streets. If you say you only won because of your price ... we can't be friends!

## FORTIFY

Now you have a new client. The business development process is not over, not by a long shot. This is where you need to focus on slowly, but surely, earning client loyalty. I've already mentioned the face-to-face client feedback/performance review meetings. Find a good spot during each project to find out how your team is performing in the eyes of the client. Don't wait until after the project is complete, as that could be too late to fix a possible fractured relationship that was never shared. What also helps to fortify client loyalty is doing your best to make sure your colleagues understand and

believe what makes your firm unique and special. Quick hint ... it's not what you do. It's how and why you do it. Focus your differentiating messages around your people and culture, as well as the lessons learned that only come from your specific experiences.

## CULTIVATE

It may have happened a time or two over the years, but I doubt many firms get repeat work by saying at the end of a project, "Hey, give us a call when you've got something else!" If you're not staying diligent with your engaging, listening, understanding, responding, and informing, then you might have to start from scratch with that client. And who wants to do that?

We spend a lot of time and effort securing new clients and earning their trust. Let's make sure we're doing everything we can to maintain our preferred status because believe me, many other firms are trying to take that position away from you. Stay diligent!

## BONUS STEP

Between and during every step we've discussed, there's one key phrase or sentiment that must be shared consistently, and that's "Thank you!" Never stop saying it and never stop sharing your appreciation.

When we ring the bell to signify a new project award in our office, people know not to ask, "What did you sell?" Instead they ask, "What did we win?" That's a question that never gets old and comes from a proactive, persistent, and professional business development process. ■



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