

Series foreword

The *Good Practice Guide* series has been developed specifically to provide architects, and other construction professionals, with practical advice and guidance on a range of topics that affect them, and the management of their business, on a day-to-day basis.

All the guides in the series are written in an easy-to-read, straightforward style. They are not meant to be definitive texts on the particular subject in question, but each guide will be the reader's first point of reference, offering them a quick overview of the key points and then providing them with a 'route map' for finding further, more detailed information. Where appropriate, checklists, tables, diagrams and case studies are included to aid ease of use.

Good Practice Guide: Marketing your Practice

Competition for work is a sign of a healthy industry, and competition in the construction industry is today as intense as it has ever been. In the face of the combined challenges of economic recession, new procurement routes, competitive pricing and ever more sophisticated clients, every architectural practice should aim to maximise its chances of standing out from the crowd.

To do so, architects must take a professional and organised approach to selling the services they provide. This admirable *Good Practice Guide* shows how to do exactly that. Avoiding jargon, it makes clear from the outset how marketing goes hand-in-hand with developing a greater understanding of your practice's strengths, of your clients' needs and of the broader opportunities out there.

This is the key message of the book: successfully marketing an architectural practice is about much more than simple promotional activity. It is about taking a considered approach to growing your practice, positioning yourself

within the industry, communicating your vibrancy and developing new business. All of these are vital to the health of any business, and I recommend that all practices think about them, and take time to implement them creatively.

Ruth Reed

President, RIBA

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Section 2

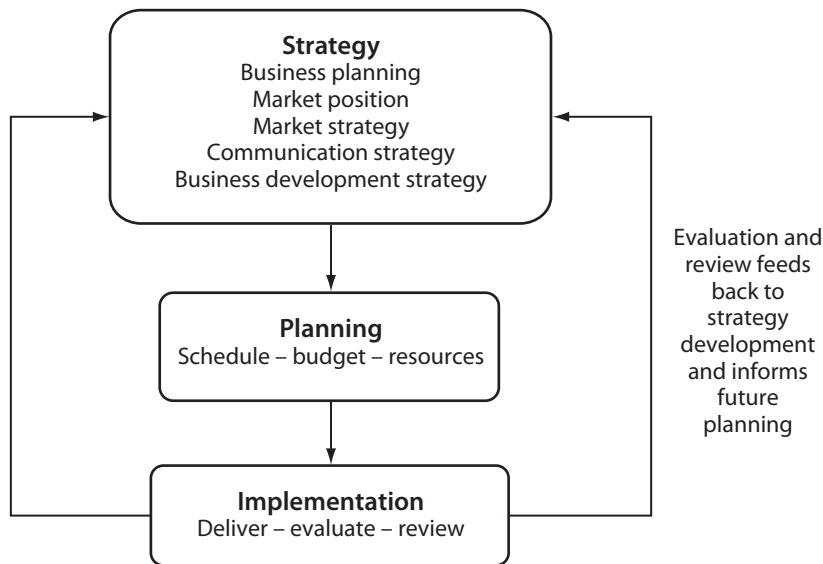
Marketing strategy: from planning to delivery

Judith Powling and Julie Fitzsimmins, *Lodestar Marketing*

Marketing strategy is about translating business plans, business objectives and aspirations into reality. A business plan is the master plan for the architectural practice. Whether managing the process internally or with external help to establish the business plan, the aim is always to develop a plan that will drive conclusions and actions. Business plans provide a robust platform from which to develop marketing strategy and plans, but so many business plans end up on the shelf, gathering dust. Ensure that your practice's business plan is revisited regularly and kept alive; question the plan and review it, so that it does not become set in stone, intractable and unwieldy.

Generally, not just in architectural practices, but across construction and other sectors, relatively few business plans are developed. Where they do exist, businesses tend to put the plans on the shelf and launch straight from the business plan (having ticked the box for the benefit of the bank or investors) to developing 'marketing' in the shape of promotional literature and media relations.

What makes it difficult to implement business planning and marketing strategy development? In smaller businesses it is usually due to the necessity of getting on with the day job and not having specific marketing expertise within the business, but it is also to do with the tendency to 'go with the flow' when times are good. We see more reflection in periods of downturn. However, this reflection can often be too late, as businesses are not fully aware of their own

FIGURE 2.1: *Strategy – planning – implementation*

make-up, strengths and sources of key turnover, let alone the status of the firm's pipeline of work and the length of time needed to build and develop relationships to lead to new work. Practices with a dedicated 'marketing person' will frequently keep that key staff member concentrating on tender and pitch documents, websites and literature, exhibitions and events, and media relations. This approach, focused on delivery, is great, but, nine times out of ten, that delivery is not part of a coherent plan informed by a strategy.

The danger here is that marketing and communication are ad hoc and not part of a plan developed from a business strategy. This is risky. Precious resources can be wasted, and mixed and inconsistent messages can be sent to clients and other stakeholders. The activities can also be hard to manage, making their effectiveness even harder to measure in order to justify the investment. As marketing is a cost centre, it has to justify itself within the business (Figure 2.1).

Developing a marketing strategy

Marketing strategy, in its most simple terms, is about understanding how to position architectural services in the marketplace in order to deliver

business objectives and create profit. There are key areas to explore, research and capture.

This process presents a great opportunity to develop an understanding of the marketplace, gain inspiration and think about how best to grow or consolidate the business. A clear process helps to ensure that plans are based on something rigorous and meaningful, not just plucked from the air. It creates core information that can be shared with, and easily understood by, colleagues within the practice.

Working with colleagues to develop a marketing strategy

Share the research and information-gathering activity between partners, directors or associates, or ask the marketing specialist in the practice to manage the exercise. Some firms appoint an external expert to help drive the process and analysis. Individuals that already lead on particular sectors or business areas should drive forward the work on their sector.

Set a time-frame that fits around the day-to-day work of the practice. Meet regularly, and ensure that each meeting has agreed key deliverables so people know what they are being expected to bring or discuss.

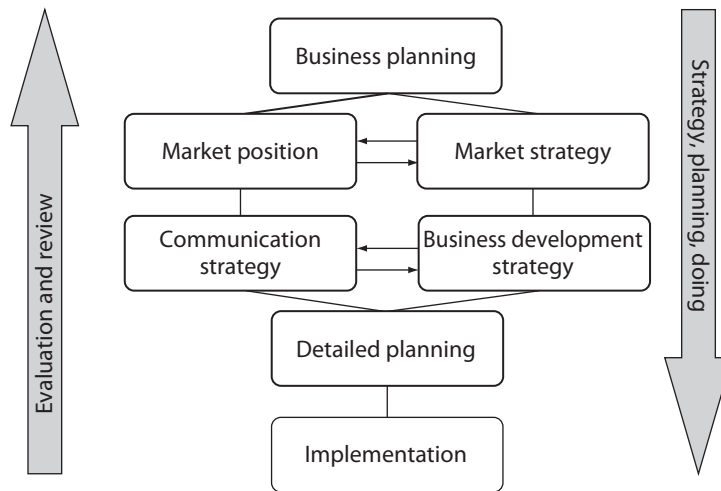
Importantly, secure senior level buy-in to ensure that findings and recommendations are supported. Ensure that a champion supports this work at practice board meetings. Set a date for presenting and sharing the information, this provides an impetus to complete the work.

The marketing strategy will develop through addressing two fundamental areas:

- market position, and
- market strategy.

These provide an informed and solid base from which a communication strategy and plan, or business development strategy and plan, or both, can be developed, depending on what is already in place and what the business needs (Figure 2.2).

The first step is to determine *market position*. Building on the framework described in Section 1, this is the process of identifying the practice's position in the marketplace, in comparison to its competitors, and identifying a strategic approach to the marketplace. Ultimately, this enables the practice to be clear

FIGURE 2.2: *Marketing process*

about what it needs to communicate, and to whom. It keeps the principals focused on the firm's offer and services and what the implications for clients and associated stakeholders are. It leads, very naturally, to the development of a communication strategy and plan.

Market position areas to review are:

- clients
- SWOT (strengths, weaknesses, opportunities and threats)
- competitors
- communication.

Client review

Many companies carry out aftercare questionnaire evaluations with their clients. This often focuses solely on the project itself, but it is important to take into account clients' views of the organisation as a whole. How do clients perceive the practice? What are the needs and challenges of current and potential clients? Understanding clients' needs and their views of the practice helps to focus the way in which the firm currently delivers work and highlights areas on which to focus in the future. It can even help to identify new added value elements that are prized by clients.

Action

- Consult with clients, past and present and potential.
- Develop a standard range of questions, for example:
 - What is the client experience of the practice?
 - Why do they choose to work with the practice?
 - How would they describe the practice as an organisation?
 - How does the practice compare with competitors/the sector as a whole? (It can be helpful to add a means of measurement against specific factors here.)
 - What challenges are there in clients' current supply chains?
 - How could clients work with the practice in the future?
 - Is there anything that clients would like the practice to do that is currently not offered?
 - Take the opportunity to discuss where the industry is going and the clients' biggest concerns. What do clients think are the major opportunities in the future and how could the architectural sector change to work more effectively with clients in the future?
- Develop and record this through telephone or face-to-face meetings, evaluation forms or client feedback sessions and then bring the information together so it can be analysed and discussed and then actions and responsibilities decided.
- Aggregate the information and present it to the board as a current view of the practice.
- Use the information to develop a written strategy by extracting key points: the practice's strengths and the aspects of what the practice does that differentiate it from competitors.

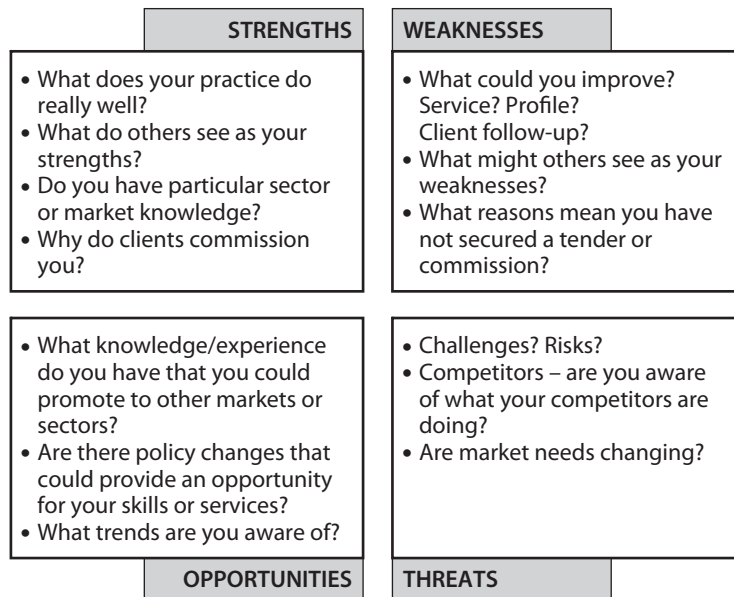
This information can then be used to inform a SWOT analysis.

SWOT – helping to differentiate the business

SWOT analysis focuses on internal issues:

What are the practice's:	Strengths
	Weaknesses
What/where are:	Opportunities
	Threats

FIGURE 2.3: *SWOT analysis*



SWOT is a really useful tool to focus minds on what the practice is good at. The most important thing is to identify and understand the factors, and then to review and assess the implications and consequences for the business (Figure 2.3).

Be honest and open when it comes to the weaknesses and the threats; equally, push hard on what constitute the practice’s key strengths. For example, a strength might be environmental knowledge – is that because of a particular specialist on the team, a particular area of knowledge, has someone been involved in policy development, or is it due to a string of successful projects which have demonstrably improved environmental performance? Strengths are what set the practice apart, what differentiate it and make the business the right choice for clients. It is vital to spend time working out why the practice’s services and skills make it stand head and shoulders above competitors and then to capture this knowledge, which can be used to inform the development of the practice’s messages and also to identify areas of growth and development for the business.

Action

- Set out the results of the SWOT analysis in a table – capturing the strengths and then considering the implications or consequences of those strengths ensures that this work is not superficial.
- Mine data collected during the consultation with clients. Capture opinions about the firm in the SWOT.
- Create action plans, particularly around the weaknesses and threats that are uncovered by the analysis.

Competitor analysis: helping to differentiate the business

Competitor analysis is created by desk-based research and by sharing knowledge about the firm's competitors. Basic intuitive and anecdotal knowledge about competitors will exist, drawn from tender situations, meetings at industry events, media coverage and looking at which firms win key awards. On unsuccessful pitches, go back to the client and ask who won the work, and try to discover what made the difference between the pitches.

Competitor analysis is fundamental to business growth and understanding of market share. Who has the larger share? How can the practice win more? Understanding what the firm is up against in existing and new markets is essential to driving success.

Action

- Combine desk research (web search and information gathering) with brainstorming or knowledge-sharing meetings. This creates a solid reference resource that can help to develop messaging, brand and corporate identity (see Section 5, *Branding an architectural practice*).
- Interview key staff to gather market intelligence.
- Take a structured approach to collecting information: compile it into tables – what do competitors do?; services, sectors, specialisms – how do they describe them?
 - How do competitors present themselves – size, length of time in business, key messages, sectors, specialisms?
 - How do they present their brand – visual and verbal?
 - What projects have they won?

- How does all of this compare with what the practice currently offers and the way it presents itself to the market?
- If possible, determine how the practice is positioned compared to its competitors. Illustrating this in a diagram or graph will aid internal communication.
- Determine the practice's share of the key markets and assess what potential share could be won.

Communication audit

An audit is a very practical way of reviewing how the practice is currently presenting itself to the market. This process often highlights some interesting issues: for example, messages may be inconsistent, brand may be applied in different ways, colours, positioning, etc. There may even be out-of-date materials that are still in use. Auditing communication materials on a regular basis is similar to undertaking an annual MOT or health check, as well as forming part of the groundwork for strategy development.

Action

- What communication materials exist – print, website? Are they doing their jobs?
- Do all materials present the practice brand consistently, both visually and verbally?
- What are the current messages being communicated? Are they consistent? Do they truly reflect the business? Do they differentiate the firm or are just saying the same as everyone else?
- How did they compare with competitors' marketing collateral during competitor analysis?
- Do the visuals and photography reflect the messages?
- Review the practice's strengths from the SWOT. Are these reflected in the language, case studies and angles that are presented? Are there gaps?

Market strategy

Market strategy is the firm's approach to the markets in which it actively operates. Clearly, this is related to its market position. Strategy and position inform each

other and, while it is important to consider them separately, they are not separate silos. Market strategy is informed by knowledge gathered about preferred markets or sectors. Actions include:

- researching the market
- documenting understanding of chosen markets
- developing stakeholder analysis of organisations to target
- developing approaches to sectors.

These activities will provide the fundamentals for a business development strategy and plan.

Market strategy areas to consider include the following:

- 1 Review the practice's current offer and services offered to its markets.
- 2 Marketplace research: examine key market trends and influences.
- 3 Who are the key stakeholders?

Review the firm's current offer and services offered to its markets

Reviewing services offered and active markets and sectors gives a clear picture of what the practice is doing, and where the work is being done. The review may find that particular high value front-end work is being successfully delivered in one sector but not in another. The review can also identify opportunities to cross-sell services to other markets, sectors and clients, and identify potential sectors to develop, all of which will form the business development strategy and plan.

Action

- **Markets.** Review how the practice currently breaks down the markets in which it operates. Which services are offered to which markets? Do they have to be adjusted for different markets?
- **Services.** Map and review each area of the business by the services offered, by sectors and by clients. How does turnover break down by service? What is the turnover and profitability? Are there some services that are highly profitable? What does this say about the business? Can services be packaged together to leverage and secure bigger projects or different clients? This area of review identifies opportunities of selling particular services to particular clients and, by extension, to particular markets or sectors.

- **Sectors.** Focus on which sectors the practice already works in, what services are offered, and the turnover and profitability by sector. Some sectors may turn over significant volume but create little profit. This allows the business little headroom, but perhaps gives critical profile in particular sectors. Other drivers for keeping less profitable work may be that it attracts excellent people or helps to retain existing staff.
- Can the practice cross-sell between sectors or to certain clients?
- Identify and agree targets for particular services or sectors to fulfil the turnover and profitability objectives set out in the business plan or gap analysis.
- Identify any cross-sectoral themes, such as regeneration or sustainability. Themes enable experience and expertise to be grouped for a range of different potential clients and stakeholders. They provide a context for discussions and positioning the practice, as well as 'hooks' for the practice's communication strategy and communication plans within different sectors.

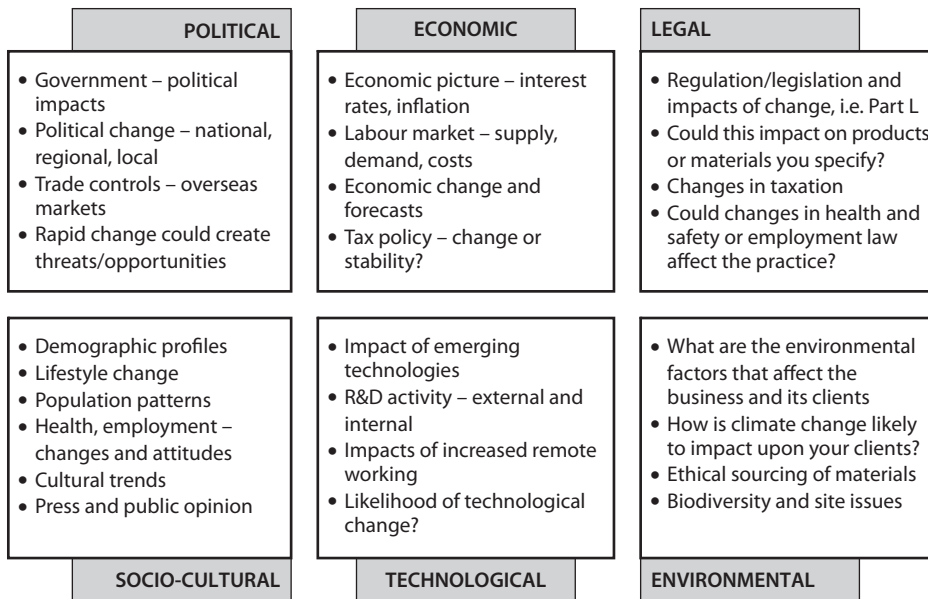
Marketplace research: examine key market trends and influences

What knowledge exists within the practice about its markets? How is this knowledge shared around the practice? Most practices have a great deal of knowledge, but it is not shared or used to develop strategy except in an ad hoc way. Marketplace research, combined with analysis of current services, will enable identification of sectors or markets to focus on and will provide factual data on which to base decisions. This will provide the strategic direction for the business development plan.

Action

- A combination of brainstorming, desk research and knowledge-sharing meetings will provide the back-up needed to make informed decisions. External expertise can help to facilitate this exercise. Consult practice-wide. Consider making it a team activity, asking everybody to bring examples, information, facts and web-research outputs to a knowledge-sharing meeting. Giving everybody a chance to contribute can be a good team-building exercise.
- Establish a process to share market knowledge gleaned from industry media, web RSS feeds and other sources; for example, forwarding items around the team or assigning individuals a responsibility to extract summary information and circulate weekly digests. Create 'Market' folders within the practice's shared folders to which people can save information.

FIGURE 2.4: PEST(LE) analysis



- Undertake PEST(LE) (political, economic, social and technological (plus legal and environmental)) analysis to look at the external factors influencing the practice, markets or sectors (Figure 2.4). PEST(LE) is a useful tool for understanding the big picture, drivers for change and consequent potential impacts on the business. Developing PEST(LE) analysis by sectors or markets also helps to develop understanding of client marketplaces and the threats and opportunities in their sectors that might affect business with individual clients. Used regularly, it provides a structured way of assessing change and impacts. PEST(LE) is also particularly useful for planning how to break into a new country or a new sector.
- What are the opportunities resulting from market trends or the current situation in a particular market? Feed this information into the SWOT analysis.
- Develop a sector-based framework or template for sector leaders to store current sector information. Identify the opportunity and record actions, these can feed into the business development strategy and plan.

Who are the practice's stakeholders?

Stakeholder mapping can be undertaken sector by sector and to plot contacts within individual client organisations. It is a fundamental and invaluable tool for understanding who to communicate with.

- *Primary stakeholders (decision-makers)* – the priority contacts that make the ultimate decisions in relation to purchasing services. A client as end-user, a developer, an investor or a contractor as client could all be primary stakeholders. Break down primary stakeholders into groups with a common agenda. For example, a FTSE 100 client usually has a different agenda to that of a private investor.
- *Secondary stakeholders (influencers)* – who influence the primary stakeholders. Secondary stakeholders can include other architects, engineers, project managers, QSs, cost consultants, contractors, planners and even lawyers.
- *Tertiary stakeholders (market influencers)* – the people and organisations that influence the market and the policies that affect the markets.

First steps are to look at the existing current sectors and potential sectors and 'map' the relevant stakeholders. This process often highlights gaps in people's knowledge in terms of who the practice should be targeting in order to develop new business, and those individuals with whom it would be politic to develop relationships to create a positive climate for decision-making in relation to a particular project. Often, this process highlights the fact that a contact base is very thin and a more robust process of developing better relationships with decision-makers or influencers would be prudent.

Stakeholder mapping is a fundamental process that provides a solid basis for the business development plan, which is about engaging closely with individuals, and for the communication strategy and plan, which focus more on corporate communication and communicating more broadly.

Action

- List the current and potential companies or organisations and then prioritise them. This begins to build the stakeholder map and identify target lists.
- If the map includes large generic groups – for example, project managers may be a critical secondary stakeholder to growing business in retail – identify the companies and specific individuals.
- Apply this approach to the sectors in which the practice currently works, set out the sector top ten for each group, then set out the practice's top ten

and compare the lists. Is the practice in touch with all of the sector top ten? Which organisations are priorities?

Pulling it all together: planning and implementation

This groundwork gives a clearer idea of the firm's market position – where it is in the marketplace – and will inform market strategy. This will enable the practice to target markets effectively by playing to the practice's perceived strengths via clear communication and business development strategies, and plans that will easily develop from the research and market knowledge developed through this process.

Communication strategy and planning

Drawing on market position, and particularly the stakeholder mapping from the market strategy development, the communication strategy will focus on the following points:

- Who does the firm want to communicate with?
- What are the key messages for the principal stakeholder groups?
 - Primary messages: what the practice is about, value added areas, perception.
 - Secondary messages: reassurance for clients that the practice is what they need.

Developing messaging

Drawing from the SWOT analysis and client consultation, identify the unique selling proposition (USP) that sets the practice apart from other architects.

- How can the practice be described?
- What are the practice values?
- What really matters to the people in the firm?
- How are these values relevant to clients?
- What is the unique message? Fulfilling basic client expectations, such as delivering to time and to budget, need to be covered but they are not primary messages.

Even well-known, established businesses can face communication difficulties if they do not have a clear proposition that can be readily understood by their clients and staff. The dreaded 'elevator pitch' may be marketing speak, but it

FIGURE 2.5: *Messaging matrix*

Messaging			Target audiences (indicate relevance for that audience)								
Message <i>What is it that you want to convey?</i>	Objective <i>What is the objective of this message?</i>	Rationale <i>The supporting story for this message – how can you evidence this?</i>	Domestic	Retail	Leisure	Sport	Heritage	Workplace	Transport	Education	Health
		Project examples Client quote Statistics Images			✓	✓	✓			✓	

does capture the essence of a short description of the business and what it does – quick enough to convey to someone while travelling together in a lift to the next floor! In networking situations those who can relay what their practice does in a compelling and concise way have a winning combination. This does not require a sales pitch but something short (around 30 seconds) that is sufficiently inspiring or engaging to stimulate further discussion. Ensure that it is focused on why the firm's approach is unique in providing value and benefit to clients. This value proposition statement overarches all messaging. Test it out on your team, and even on some particularly close clients.

Market position, client profile and target markets or sectors will heavily influence messaging. Take account of audiences' differing needs in the messaging developed – domestic residential audiences need a different approach from that used for commercial clients. Setting out the messages in a matrix will clarify what to say to which groups, and provide a structure and discipline for setting out the rationale that supports each message (Figure 2.5).

Communication planning

Communication plans are the outputs from the research and strategy. They are developed to support and deliver business objectives. Communication plans

ideally provide a year-long programme that is scheduled and costed, with responsibilities indicated. Developing plans on a sector-by-sector basis provides focus, but it is vitally important to coordinate all plans to take account of overarching corporate communication activity and potential overlap in audiences between different sectors.

For example, one key contact, say a project manager working with the firm in three sectors, could end up receiving three separate mailings or invites, wasting practice resources and giving a poor impression of the practice's efficiency. Internal systems for key account management (KAM) and customer relations management (CRM) are critical for managing contact relationships. PC- or Apple-based systems are available that do not cost the earth and can help to coordinate efforts. However, these systems are only as good as the data entered and the consistency of approach. Alternatively, a spreadsheet is straightforward and easy to use and can provide an 'at a glance' summary of the year, with detailed costed plans sitting behind in subsequent worksheets.

So, for example, a firm with a focus on developing themes of sustainability and regeneration and a business development strategy to drive forward growth within retail and the workplace might have an outline communication plan resembling that shown in Figure 2.6.

Business development strategy and planning

Preparing a business development strategy ensures careful thought about business development targets. It is no good just being busy – the effort has to work towards delivering.

Start by deciding on the practice's approach to business development. Is KAM a key approach for developing new business? Is sector-based business development the key strategy? Or is it a combination of both?

Developing new business with new clients is generally estimated to cost ten times as much as developing business with existing clients. If 80 per cent of turn-over is coming from 20 per cent of clients, clear plans are needed to involve and engage these critical stakeholders over an agreed time period.

As KAM is a process for managing key client relationships, it should include account reviews and client development plans as part of that process. KAM is

also a practical way of developing new business from existing contacts by using the network as a basis for generating new contacts.

Action

- The business development strategy should set out the business development financial objectives.
- Establish and agree business development objectives that relate to the target groups, key accounts and sectors and the method of measurement for each objective.
- Develop a brief summary of the approach to business development over a pre-determined period. Why are specific areas being targeted? What is being offered?
- Select the priority target groups from the stakeholder mapping. Agree a strategic approach to each target.
- Follow this with an action plan that sets out what is going to be done by when and by whom.

As well as thinking about business development strategies and plans, consider how this work could be supported by product development within the business and in marketing communication activity. Ensure that this is understood so that the marketing communication budget is focused on addressing business development targets.

Marketing communication

At its most basic level, in many practices marketing communication supports business development by pulling together tender and bid submissions and ensuring there is appropriate marketing communication collateral in print or online, and sometimes by developing corporate entertainment. The marketing communication team or person should be able to contribute marketing activity that supports business development and develop communication plans that engage key targets. Ensure that your marketing team understands the practice's targets and that they are focused on the groups that will deliver business in the future.

For instance, to drive forward growth within retail and the workplace, with a focus on the themes of sustainability and regeneration, marketing might organise a detailed action plan for the practice at key industry exhibitions and conferences, such as MAPIC, MIPIM, BCO and BCSC. The plan would aim to

communicate the practice's key themes and focus on business development targets. It should include setting up meetings for the principals at the events and might include hosting lunches and dinners, with key target contacts being invited. It is vital to capture all data gathered promptly on return from the event, carry out a review with all those involved and issue follow-up materials. Consider supporting event attendance through online media such as a Twitter or a live feedback blog on the practice's website.

Evaluation and review

Marketing plans should be reviewed and should be measurable. Ensure that reviews and methods of measurement are planned from the outset and that all those involved understand what is being evaluated and in what timescale. For example, quarterly reviews may be helpful in keeping plans on track and relevant to changing business conditions.

Whose job is marketing?

The size of the business will dictate the marketing structure that is put in place. There are volumes of research (for example, *Marketing in SMEs*, by Simpson, Padmore and Taylor, May 2005) demonstrating that businesses, particularly those in the small to medium-sized category (most architectural practices), enjoy increased turnover and profitability if they have a specific and discrete marketing function and a structured approach to strategy and implementation.

It is important to secure buy-in from owners, partners and directors. Ideally, marketing needs a champion and advocate at a high level within the practice. Marketing activity needs to be well-documented, demonstrating the activity and results from the investment. Marketing can drive market knowledge and intelligence in the business to enable all those involved in working with clients and securing new business to be as effective and informed as possible.

SUMMARY

- Marketing strategy is about translating business plans, business objectives and aspirations into reality.
- The daily demands of a small practice and a lack of specific marketing expertise within the business need not create a barrier to formulating an effective marketing strategy.
- SWOT analysis is a useful tool to focus minds on the practice's current strengths. Review the practice's current position regularly and examine market trends and influences.
- PEST(LE) analysis is an efficient way of understanding changes in the market.
- Stakeholder mapping provides a measure of the key targets for communication.
- Ensure that everyone within the practice understands the marketing strategy and is motivated to deliver the practice's message.

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