

# Lessons Learned from a Client-Focused BD Initiative

*Business Development Best Practices Series*

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With the stress of billable targets, endless client meetings, project deadlines, and business development goals, it's hard enough to find time together in the office, much less focus on a tailored business development strategy. How can marketing work with seller-doers to overcome these challenges and move in a targeted direction of success?

## **Our Goal: Increase Visibility with a Major Client to Win New Work**

Our technical professionals were not taking full advantage of opportunities with our largest client due to limited available time. A heavy project workload, mixed with various business development goals and industry organization involvement, was taking its toll on our project managers, who were like ships passing in the night due to obligations outside the office.

Our marketing team realized that we needed to get a sense of what each project manager was accomplishing and identify how to unify the collective group's knowledge to establish concrete leads. After taking some time to explore our group's efforts and misses, we discovered that our seller-doers were at times duplicating efforts due to a lack of communication amidst their many responsibilities. We decided to hit the pause button and improve the efficiency of our time spent on business development efforts to meet our other competing demands, yet remain visible to our cherished client.

## **Lesson Learned #1: An Efficient, Well-Run Meeting Can Provide Value**

The marketing team proposed a monthly, hour-long, in-person meeting to share progress and leads related to our primary business development goal. Although there was some initial grumbling at yet another meeting on already overfilled calendars, marketing stressed the importance of communication. Without a dedicated business development meeting, folks would share quick tidbits of whatever they could remember in the break room to whoever was gathered, missing the opportunity to expose this intel to a holistic view by the entire group.

Getting together in a conference room for one hour a month formalized the lead-sharing process. We discovered opportunities to sell and achieve business development goals by scheduling meetings more strategically, both geographically and through consolidation of meetings to one or two days of travel. This allowed the team to knock out travel and expenses all in one fell swoop, providing the opportunity to clear their calendars and plan their other commitments around being out of the office. We also realized that our team would speak to the same client through several different gatekeepers, and there was a need to consolidate the information into collaborative leads.

Once we started to meet regularly, the trends and feedback we received from our network became fluid and much more helpful in identifying leads to win more work. The grumbling quickly dissipated,

and the group has started to look forward to these meetings to share important news and leads for a unified approach to business development. We realized that when team members are operating in their own silos, the potential impact of our efforts is not realized.

## **Lesson Learned #2: Organizational Tools Are Your Friend—Even a Simple Excel Spreadsheet**

Once we had everyone's attention all in one place at the same time, we created a quick tool to guide the conversation for each meeting: an Excel spreadsheet organized by our client's business units. We structure the meetings around the tool, acting as an agenda. If there is nothing to report that month for unit A, we move on to the next unit, making sure not to waste time.

The familiarity and efficiency of the meeting encourages folks to attend. The file is updated as each team member reports new leads, pending action items, and new targets for the following month. We also identify any marketing collateral needs and identify deadlines for the creation of those pieces. If an individual cannot attend the month's scheduled meeting, the group has a link to the tracking document and can enter updates before the meeting. This tool streamlines the meeting flow, and we can set appropriate expectations for meeting length and content.

## **Lesson Learned #3: Follow-Through Is Essential**

Lastly, we identify the responsible party for pending action items at each meeting and set deadlines for action completion. When an individual sees his or her name assigned to an action in the Excel tool, the expectation is that he or she has plenty of time to make some sort of progress before the next 30 days is complete. The marketing team also follows up periodically over the following 30 days on assignments to make sure everyone is moving in the right direction before we meet again.

## **Success: Winning Work!**

Learning from these lessons, our team members found the value in a targeted, client-focused strategy, and what appeared to be an overwhelming business development goal became much more manageable. Our group has come to really value our monthly hour around the conference table, working to improve our visibility efforts with our top client in an organized, impactful way. We have seen the fruits of these efforts through an increase in new assignments from our client, a tangible reminder that proper business development strategy does not need to take up a ton of time to be effective, organized, and rewarding.

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