

# Primary Concerns

Primary research involving input from clients and industry experts should be a key element in developing your firm's marketing strategy.

**WHEN MARKETING YOUR A/E/C FIRM TO POTENTIAL CLIENTS, RESEARCH IS AN INTEGRAL PART OF THE STRATEGIC PLANNING PROCESS.** It helps shape the direction of your efforts—what markets you will enter, expand within, or exit. It also assists in best reaching sub-sector groups within markets, because you learn the nuances that will most appeal to the decision makers.

Primary research is the most important type of research to your marketing endeavors. Its purpose is to answer your company's specific questions, and it is typically gleaned from direct exposure to sources through focus groups, interviews, surveys, observation, and testing.

As technical leaders within your firm, you can play an integral role in facilitating primary research, especially within your existing markets. Why? Because you are the ones regularly engaged with your clients. By working alongside your marketing/business development team, you can collaborate on research to collect the data that will best guide your firm's future business decisions.

## Asking the Right Questions

Part of the research process is asking questions that are specific to your firm and its marketing efforts. Some very beneficial insights might come out of asking your clients questions such as these:

- ✓ What trends do you anticipate over the next three years for your company? How do you see things changing, and why?
- ✓ What imminent economic, social, or political issues may impact your company, and why?
- ✓ What are the biggest challenges that your company/industry is currently facing?
- ✓ How might an A/E/C firm help you to address these challenges? Are there additional services that you would suggest?
- ✓ How do you see your personal role in your company changing in the next three years?
- ✓ What are the top three decision making criteria that your company uses when selecting an engineering firm?
- ✓ What forms of marketing does your firm consider most effective? What kind of information would you find most helpful, and in what form would you like it communicated?

## Meeting Planning

Once you determine the data you need, it's time to get people talking, sharing, and brainstorming. Here are four solid techniques to get the most out of your primary research:

**Integrate your research within a client perception discussion.** You need to get client feedback anyway, so why not ask for industry insights at the same time you are discussing their perception of your firm and its performance? When you are dealing with clients with whom you hope to have an ongoing (even lifetime!) relationship, my suggestion is to hold a focus group upon the project's completion. Invite an array of people representing various segments of the project: your day-to-day client contact, project owner, contractor/construction manager, sub-consultant(s), real estate entity, etc.

The cool thing about multidisciplinary focus groups is that attendees will remind one another of what occurred during the project. Of course, these meetings can backfire if the project has experienced some bloopers; only hold them if you're willing to professionally manage potential conflict.

In a well-run focus group, every participant can learn something.

Once you've received feedback regarding the project—which will likely include some fantastic testimonials for future marketing strategies—you can then move on to facilitate a dialogue around industry insights. If you have ever participated in a well-run focus group, then you know that it's actually quite fun to hear one another's perspectives. A well-run focus group will leave participants feeling that their time was well spent—not just as an obligatory clearinghouse for feedback, but in terms of learning something new.

**Emphasize the value of the client's expertise by including their input in an article or white paper.** Do you write articles for publications, craft white papers to entice prospects, and submit abstracts to speak at conferences? I hope your answer is yes, and if so, why not involve a client or pros-



BY ANNE SCARLETT

Anne Scarlett is president of Scarlett Consulting ([www.annescarlett.com](http://www.annescarlett.com)), an A/E/C marketing advisory services firm that provides customized business development/marketing training programs. She can be reached by phone at 773.251.8132 or by e-mail at [anne@annescarlett.com](mailto:anne@annescarlett.com).

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pect in any or all of these efforts? By letting them know your intentions for picking their “expert” brains, they will be more than happy to grant you an interview and share their thoughts. Not only will you have new data to support or guide your firm’s marketing strategy, you’ll also have information to add to your position within the article, white paper, or abstract, and you will be building a stronger rapport in the process! It’s win-win-win situation.

**Stress that having clients and experts help you can very well help them.** Even in business-to-business contexts, people love to talk about themselves. It may even be their favorite subject. So why not stress the fact that their willingness to share their perspectives and industry knowledge could quite possibly help you to help them in their professional roles, even if you are dealing with those at the ownership level? In fact, owners may reap more benefits than anyone, since they are (often) more vested than anyone in the growth of the company at large. By sharing challenges and trends with you, there is the potential that your firm could, in turn, evolve and innovate to better serve their business purpose in the future.

**Host a private roundtable forum.** Just as professional organizations hold private, invitation-only roundtables, so can your firm. Many A/E/C firms organize special events for clients and prospects. It’s not always easy to coordinate these parties, but it can be done, especially when you are bringing your own existing clients together. Let’s say that once a year, you invite representative, non-competing clients (just a few, not all of them) to your firm as a thank you for their business. Perhaps your agenda involves a program where you discuss big-picture external issues that have varying impacts on the attendees. Attendees can share case studies and lessons learned in relation to centralized themes (e.g., budget approvals, internal workflow/processes, technology, etc.). Perhaps you wrap up the business portion of the program by pairing people up to brainstorm on one another’s business challenges. You then conclude with time for socializing and networking over a meal; good food is a divine motivator!

### **Be the Baker**

Primary research is like cookie dough. Once you’ve collected and mixed all the ingredients—all of the insights from your sources—you can roll it out and cut it into whatever shape best suits your company’s marketing plan. Just make sure it isn’t half-baked.

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