

MARKITECT



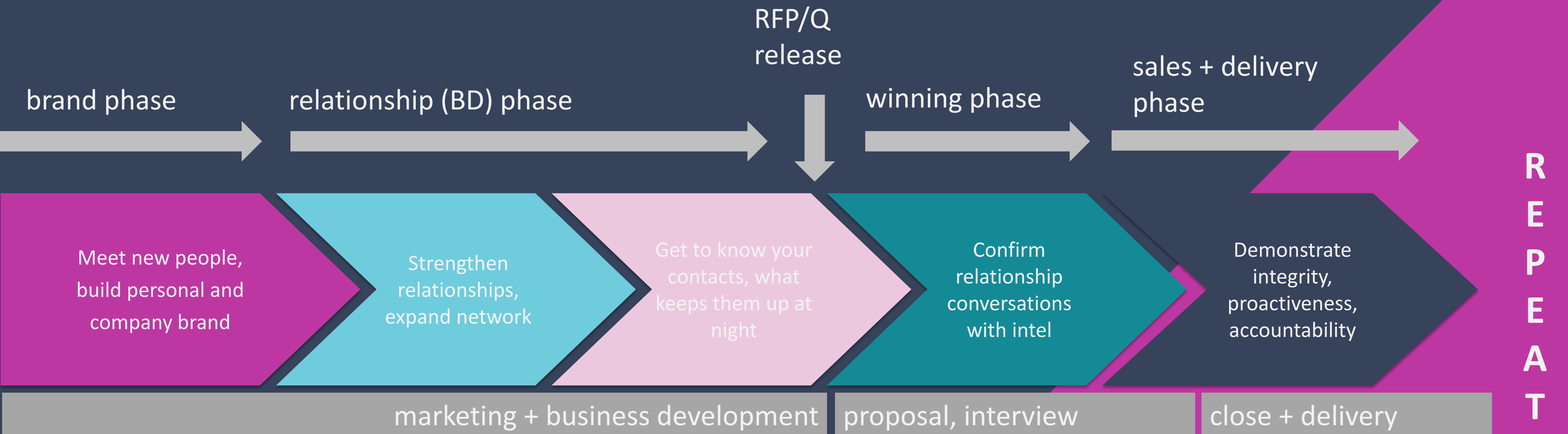
THE CLIENT DATING GAME

WINNING THE CLIENT AND PURSUIT!

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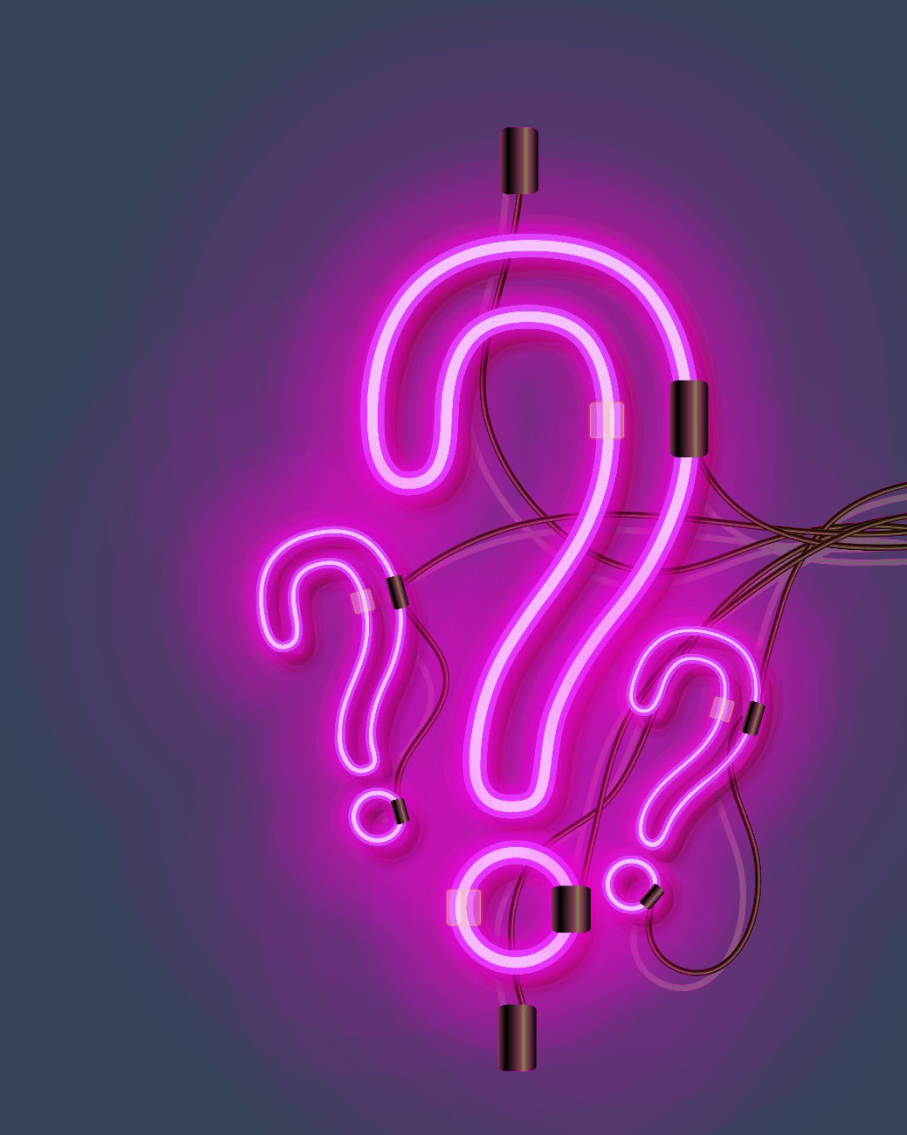


HOW IT ALL FITS TOGETHER: CLIENT + PURSUIT LIFECYCLE



If we were good at everything,
we'd have no need for each other.

: Simon Sinek

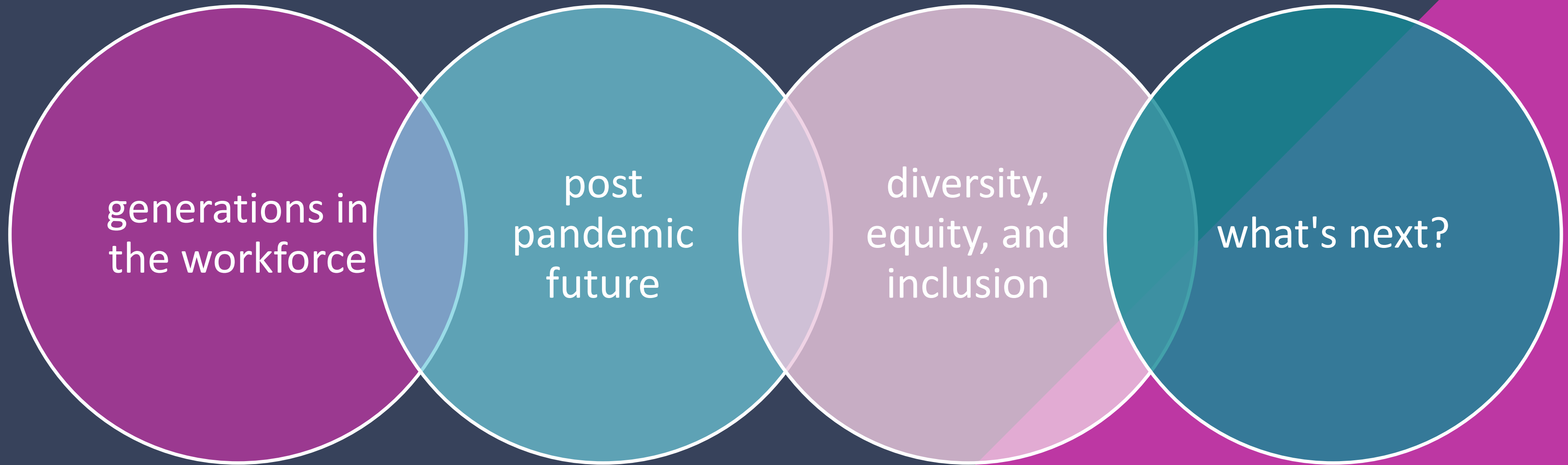


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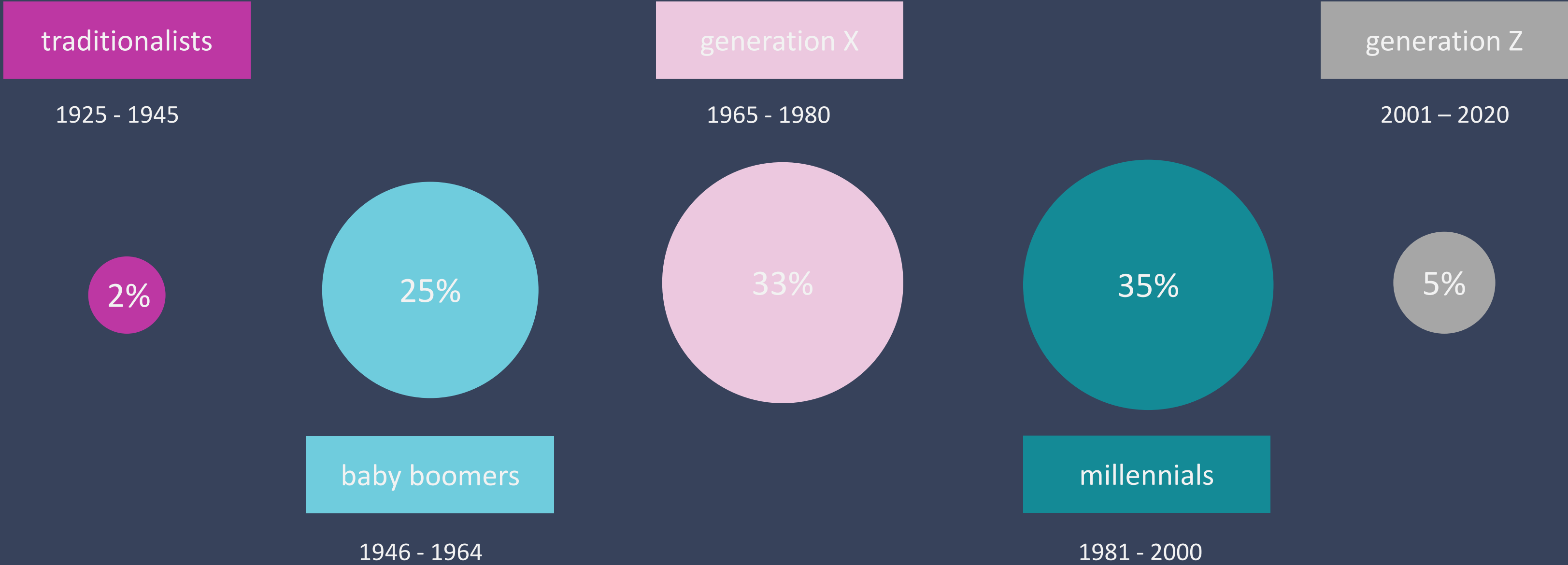
RELATIONSHIPS + GOOD WORK = MORE WORK

CHA – CHA – CHANGES!



SHIFT 1 : GENERATIONS

current U.S. workforce numbers



source : Purdue University Global, Inc., a public, nonprofit institution

ENGAGE MILLENNIALS

by 2025, Millennials will
comprise what percentage
of the global workforce?

- A. 55%
- B. 65%
- C. 75%
- D. 85%

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WHETHER EMPLOYEES OR CLIENTS,

millennials want firms that:

- foster innovative thinking
- develop their skills
- make a positive contribution to society

SHIFT 2 : PANDEMIC

- remote interactions
- hybrid interactions
- WFA + collaboration
- company culture



HOW WE CONNECT + BUILD RELATIONSHIPS



BUILDING AND MAINTAINING RELATIONSHIPS

best practices pre-/post-Covid-19

- conferences
- meals/happy hours
- networking events
- in-person meetings
- in-person lunch and learns with prospective clients
- PLUS post-Covid-19 > hybrid!

best practices during Covid-19

- virtual lunch and learns with prospective clients
- Door Dash lunches, signature happy hours
- contribute thought leadership pieces for blog, social media, case studies, etc.
- opportunities to be helpful, navigate an uncertain time and future
- new ideas identified and used more frequently

SHIFT 3 : DIVERSITY, EQUITY, AND INCLUSION

hiring + teaming practices
meaningful inclusion
it's more than “meeting a
mark”
education, awareness
BIPOC + beyond



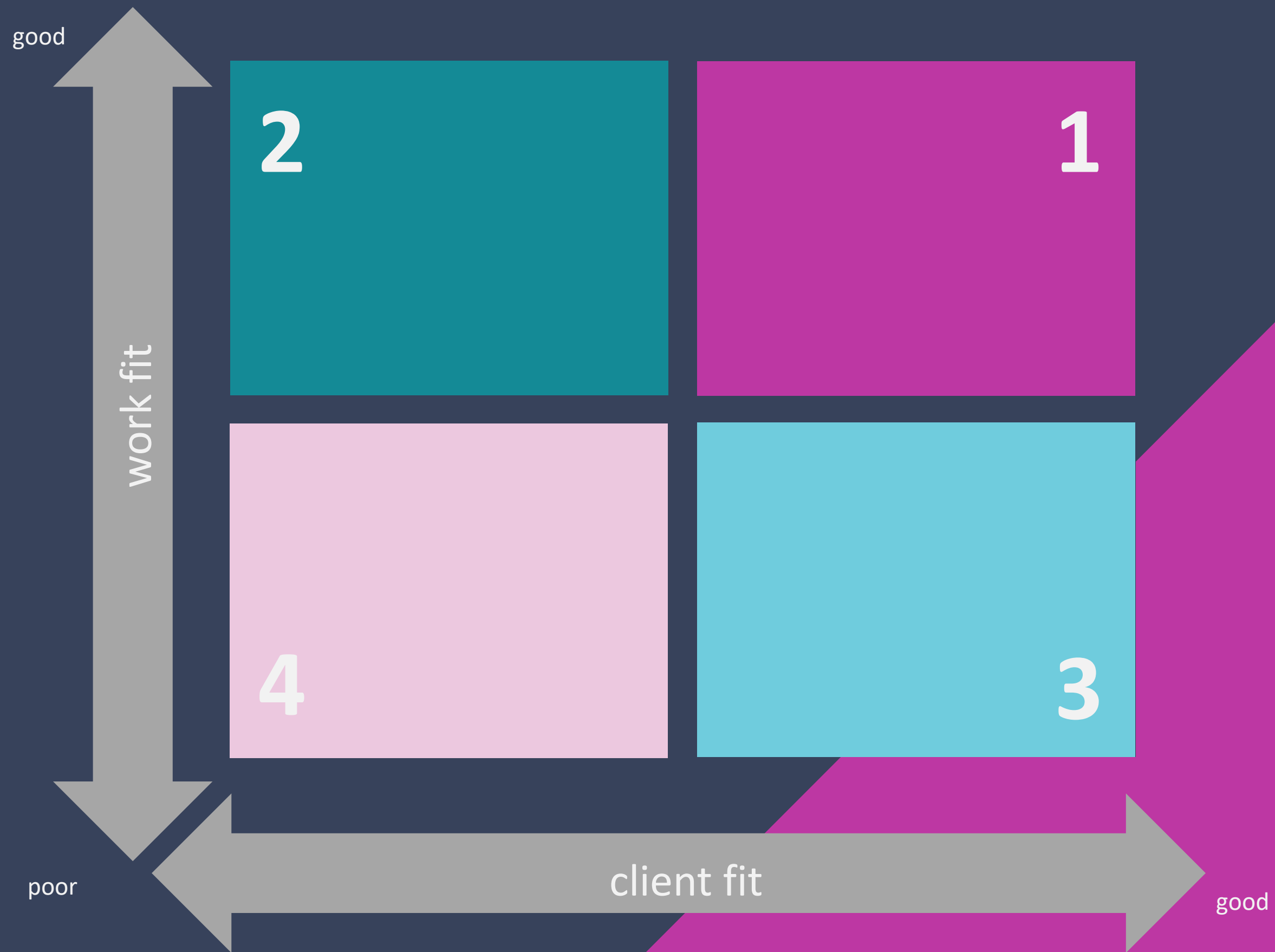
INSIGHTS FROM DIVERSE PERSPECTIVES



RELATIONSHIP DEVELOPMENT FEEDS PURSUIT DEVELOPMENT

- keep the long game in mind
- one meeting or interaction does not a trusted relationship make
- research + intelligence = connect the dots

IS THE CLIENT A FIT FOR YOUR FIRM?



THERE'S NO SUCH THING AS TOO MUCH INFORMATION!

- communicate, share
- what you learn during a project
- what you learn in a “BD” setting
- capture plans

WHO BELONGS IN YOUR NETWORK



USING LINKEDIN TO BUILD BUSINESS

New accounts increased by 15 million members between January and April 2020

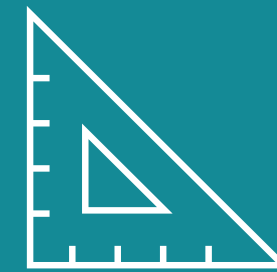
*Overall engagement and session usage is up 26% during COVID**

source : [socialmediatoday.com](https://www.socialmediatoday.com)

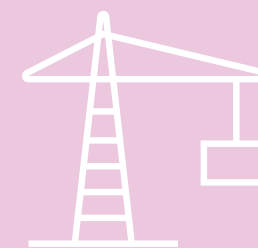
- connect > clients, targets, connectors, influencers
- follow > partners, competitors
- gain intelligence > client, opportunities, competitors



clients,
targets



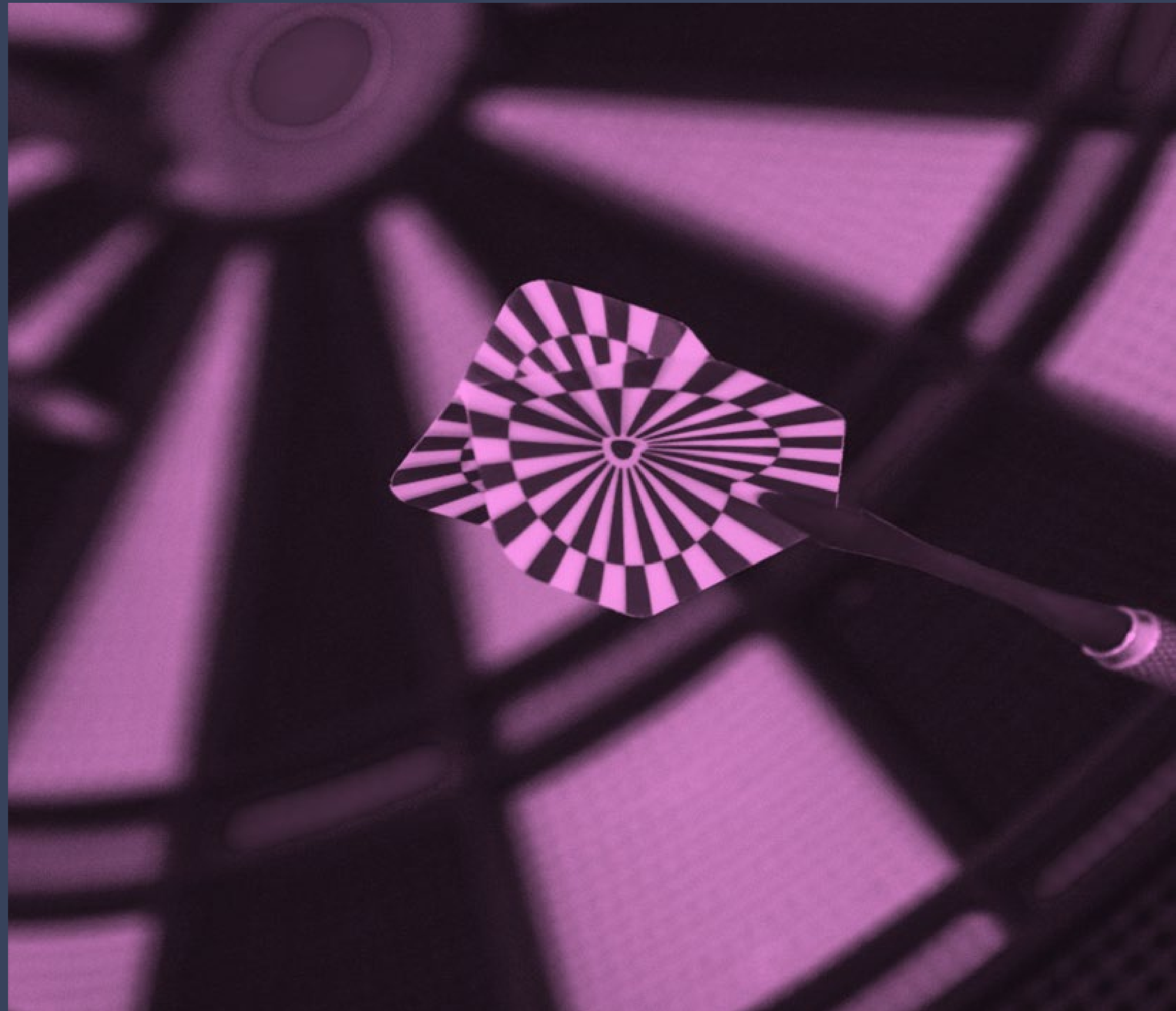
teaming partners,
consultants



contractors, subs

LOOK FOR OTHER CONNECTIONS WITHIN THE ORGANIZATION

- ‘warm’ introduction
- decision makers,
influencers
- help navigate an
organization’s structure
- details



TALKING TO CLIENTS



come prepared



what's the point of
the meeting?



existing client or new
client?



in person, on the
phone, or on video



create a dialogue,
bring value

TALKING TO CLIENTS

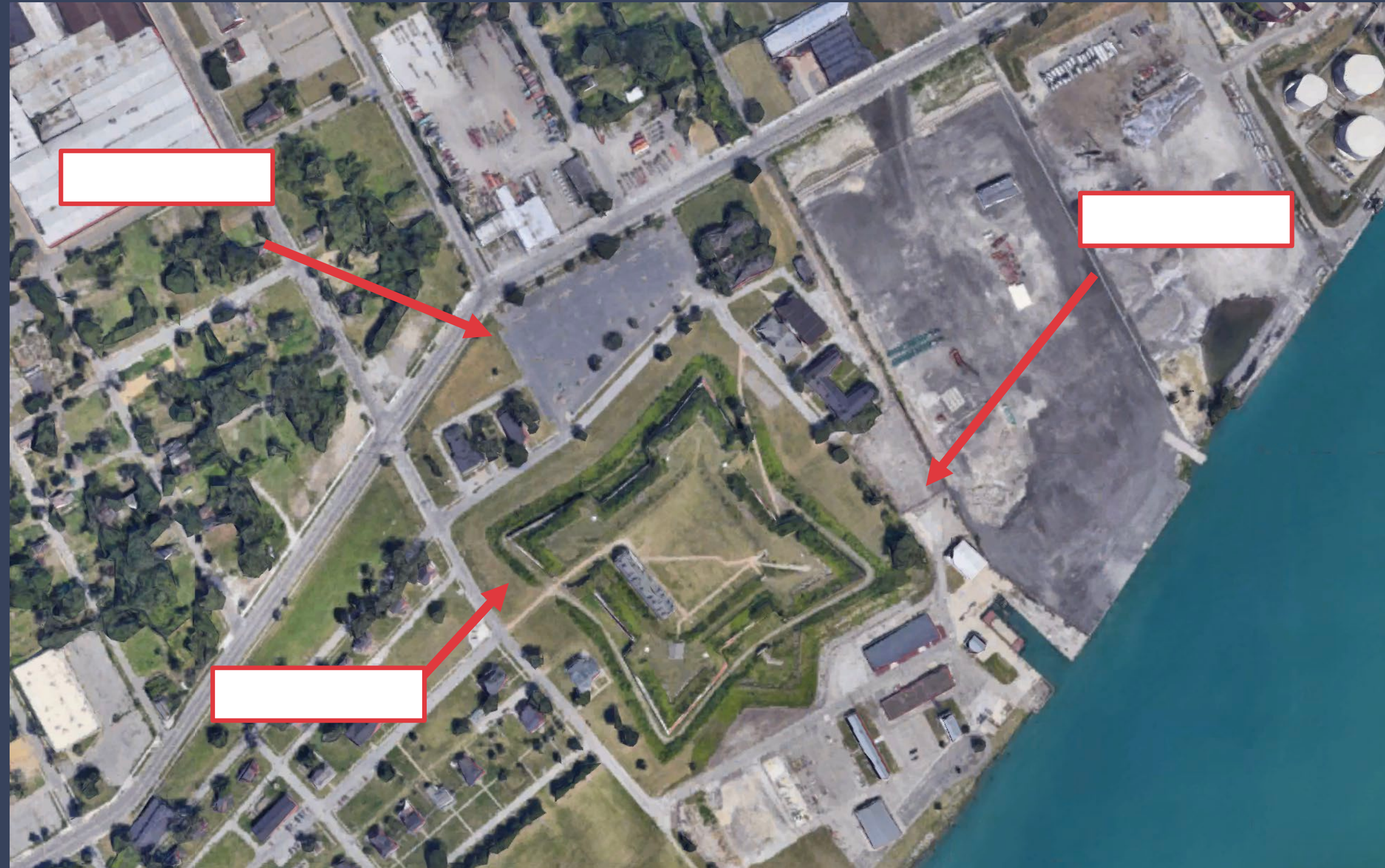
- communicate clearly
- bring ideas
- commit 100%
- follow-through
- respect each other
- no assumptions
- share the load
- mentor one another



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USING AN ISSUES MAP TO GUIDE PURSUIT CONVERSATIONS

- teamwork, collaboration
- easier to communicate with visuals
- note-taking live on-screen or in person



CLIENT MEETINGS



Select three important questions ahead of time

Make the questions open-ended and easy to answer



Be ready for questions about you and/or firm



Practice

LISTEN!

BE CURIOUS + LISTEN

tell me more . . .

how so?

why do you say that?

for example?

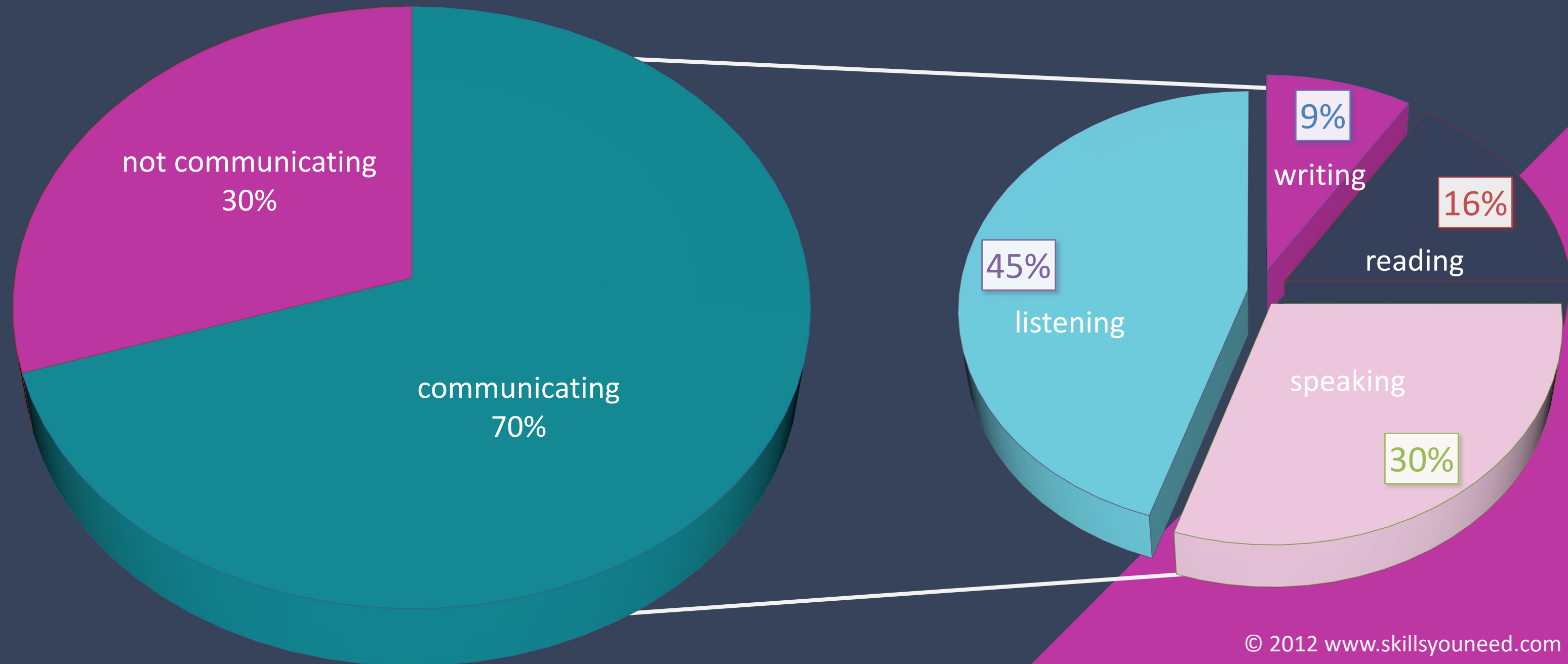


specifically?

what do you mean?

what else should I
know?

TIME SPENT COMMUNICATING



based on the research of: Adler, R., Rosenfeld, L. and Proctor, R. (2001)
Interplay: the process of interpersonal communicating (8th edn), Fort Worth TX: Harcourt.

EFFECTIVE EXCHANGE OF INFORMATION



ASSESSING YOUR POSITION : CAPTURE PLANS!



encourages teamwork,
collaboration >
#smartertogether
#strongertogether

strengthens your
position > what you
know and don't know,
red flags

enhances
communication

raises win probability

ZIPPERING THE CLIENT



IDENTIFY KEY CLIENTS, PROJECT CONTACTS

approver

authority to approve expense and sign contract

decision maker

authority to say yes (verbal)

influencer

opinion counts, bearing on outcome

recommender

evaluate proposals, make a recommendation

gatekeeper / blocker

restrict access to decision maker

users

operate or access solution on a day-to-day basis

champion

willing to actively fight for you within the decision-making process

mentor

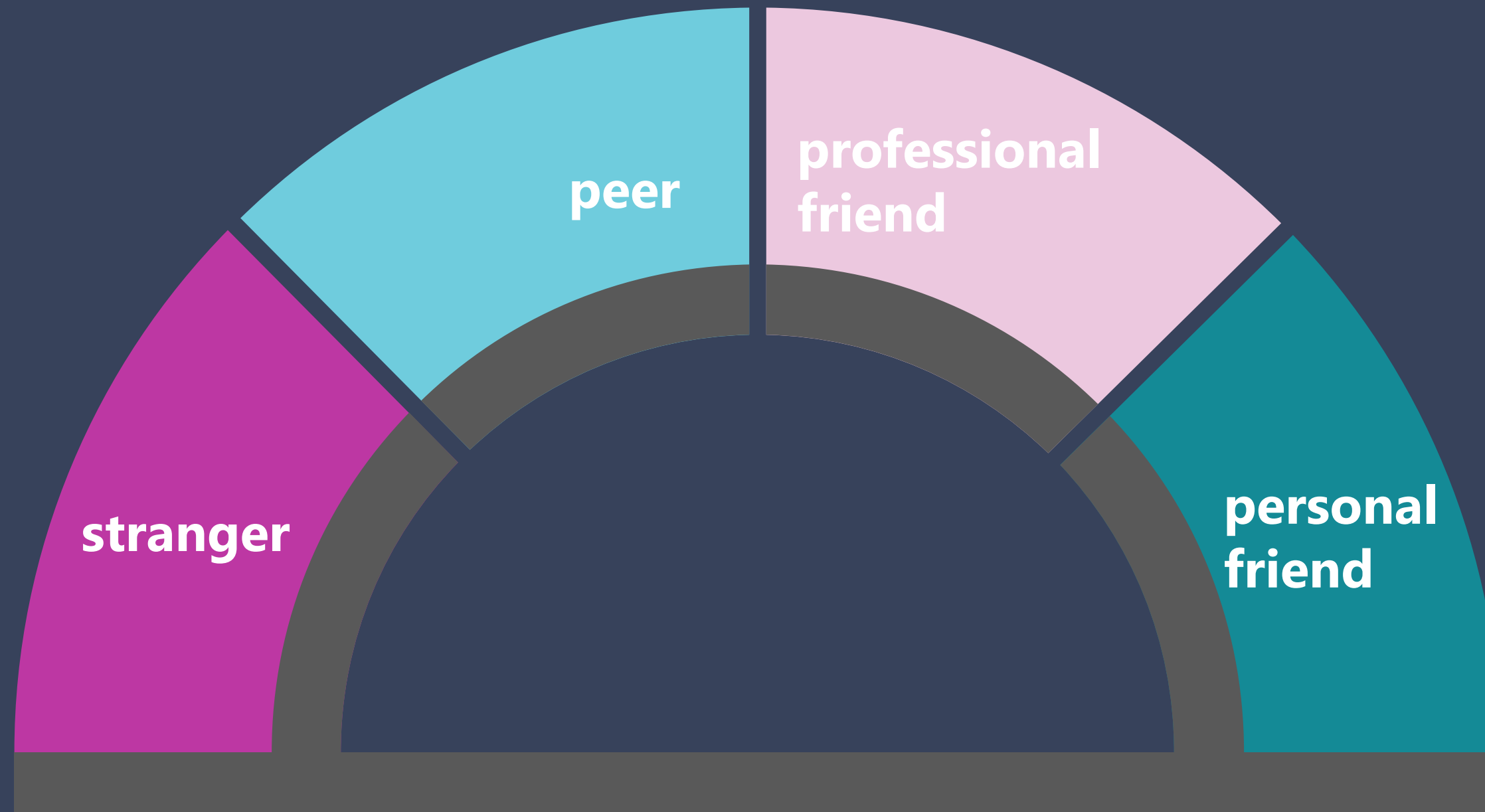
provide guidance outside the decision-making process

stakeholder

a person with interest or concern in project

KNOW THE CLIENT AS A PERSON

- interests, hobbies
- university or sports team
- last, next vacation
- married, kids
- etc.



UNDERSTAND CHALLENGES DRIVING DECISIONS

- budget, funding constraints
- land availability
- personnel, talent
- regulatory climate
- capital availability
- market and political conditions



DIG TO UNDERSTAND ORGANIZATIONS + INDIVIDUALS



CHALLENGES

what are their concerns?
what need drives this project?
what could impact delivery?

CONCEPTS

how will you resolve each pain point?

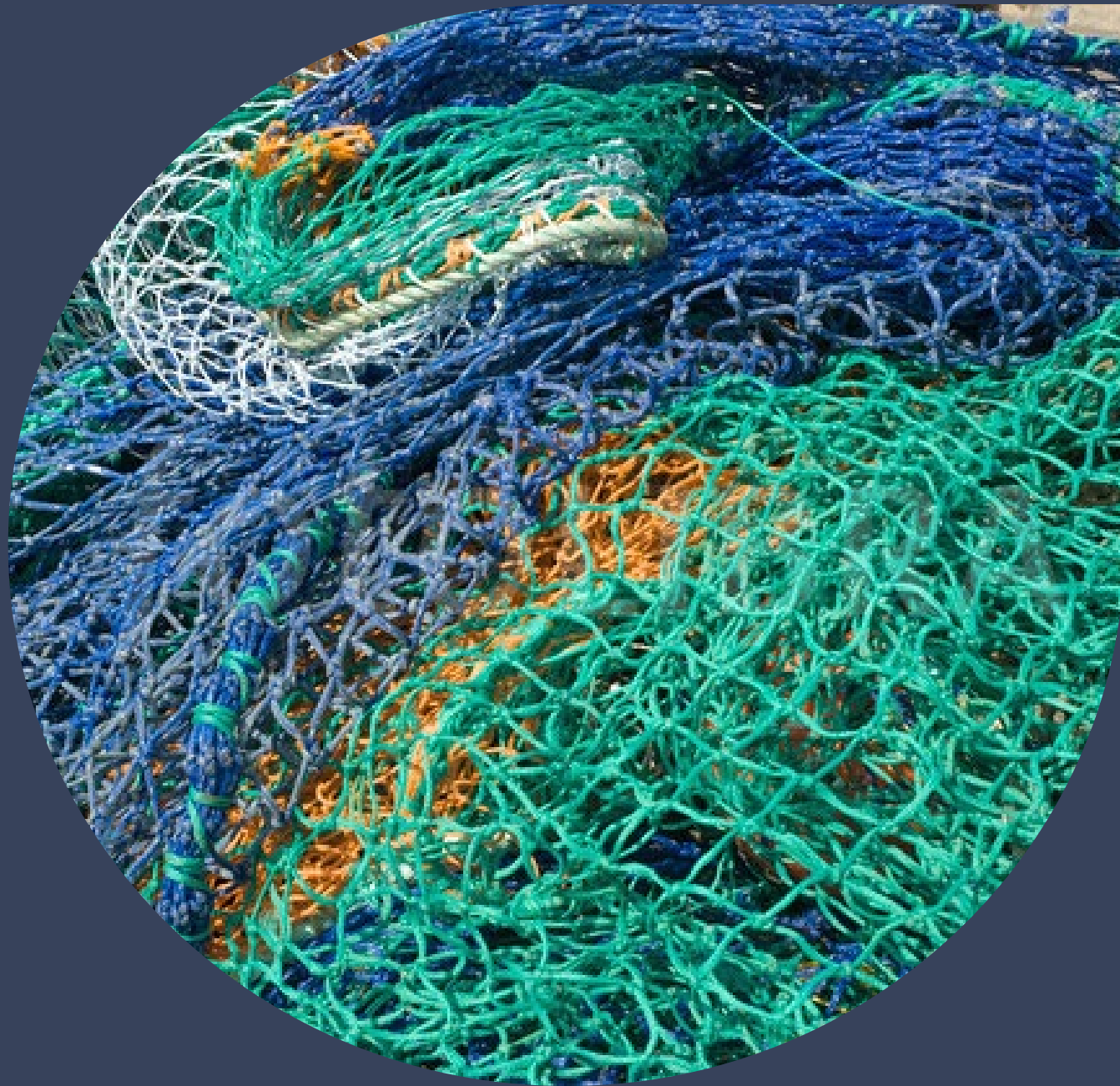
GAINS

what does the client gain with your concept?

EVIDENCE

where have you done it before?

CONSIDER DRIVERS FOR SELECTION COMMITTEE AND INFLUENCERS



- triangulate information
- facts vs. emotion
- cast a wide net
 - more than one person at the client
 - look inside your own organization
 - look at teaming partners, subs
- diverse perspectives give a clearer picture of what's important

EDUCATE BEFORE THE RFP

few reviewers thoroughly read proposals

+

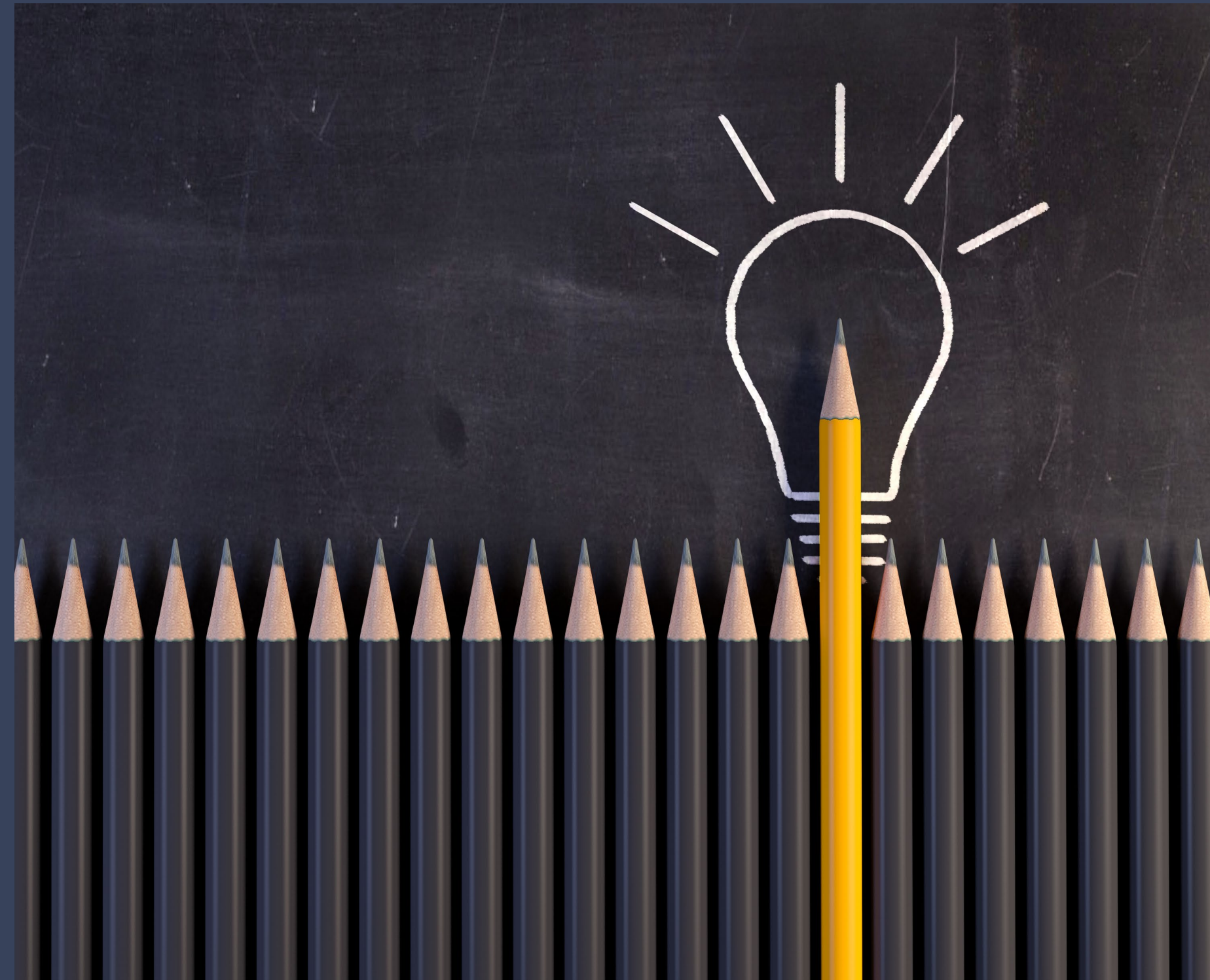
they rarely understand a new concept in a proposal

ask > listen > test > revisit



INDICATORS WHEN THE CLIENT “GETS IT”

- Tell me more about XYZ...
- I did some research on XYZ, what about _____?
- Where can I find more info on XYZ?
- Have you done XYZ with another client? Can I talk to them?
- If we use XYZ, how will it work in this circumstance?



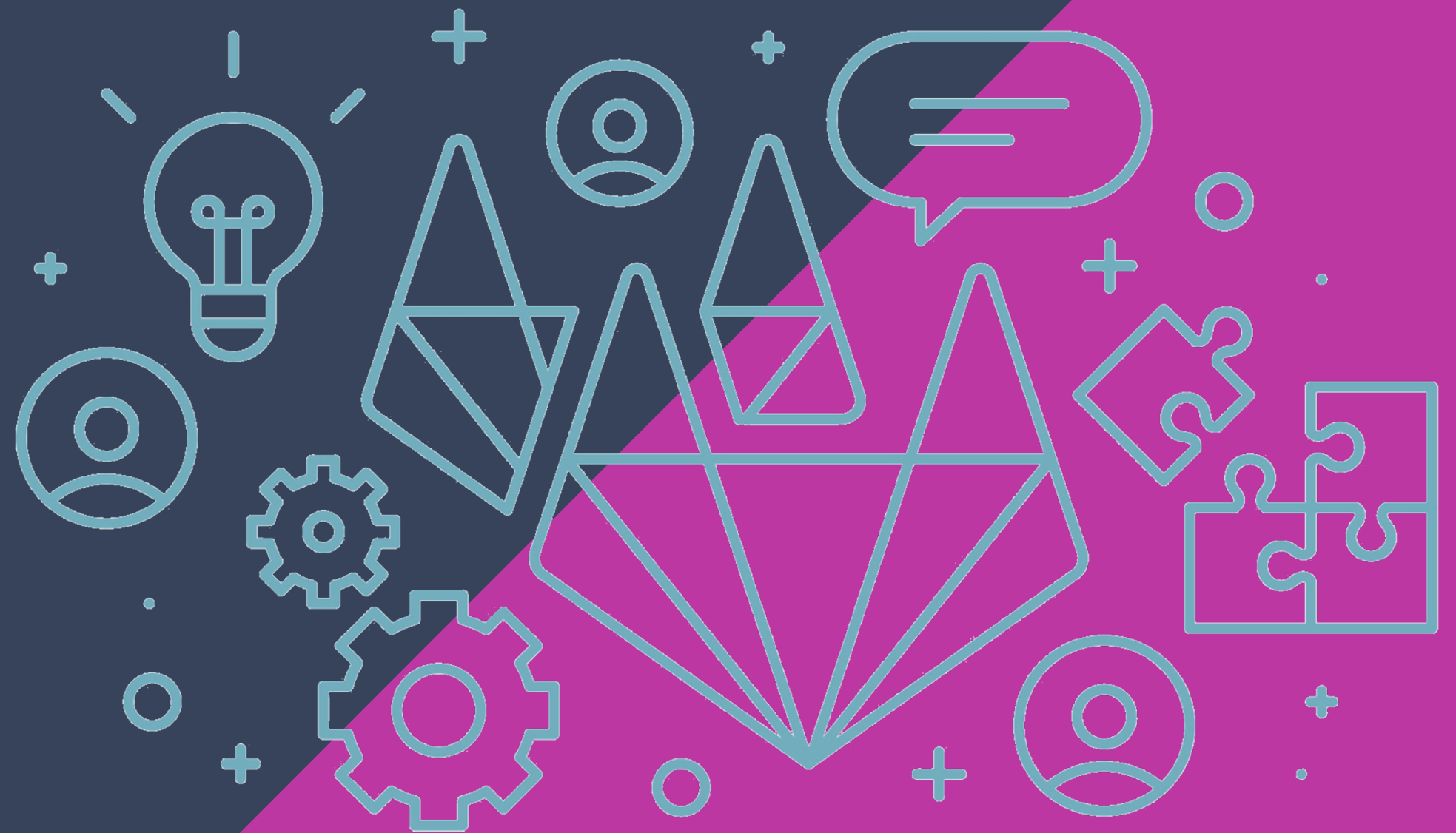
DOES THE OPPORTUNITY MAKE SENSE?



client expectations align
with your firm's ability to
optimize profitability

KEEP THE CONVERSATION GOING

- collaboration between marketers, business developers, and doer-sellers to facilitate the process
- brainstorm intel you gain from client conversations
- gain insights from others engaged in the pursuit outside the client



The value of our knowledge
multiplies when we share what we
know with others.

: Simon Sinek



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IT'S ALL ABOUT ?

- A. your portfolio
- B. the client
- C. your team
- D. the money



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IT'S ALL ABOUT THE
CLIENT!



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CREATE KEY MESSAGES FOCUSED ON THEM!



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LET'S TALK HOT BUTTONS, CRITICAL SUCCESS FACTORS



FOCUS ON THE CLIENT + THE OPPORTUNITY

capture plans inform your key messages

- › Hot Buttons = challenges
- › Differentiators = concepts, gains

less is more – when it comes to you



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WINNING THE CLIENT DATING GAME

**client +
opportunity**

DO YOUR RESEARCH

MAKE A CONNECTION

BE CURIOUS + LISTEN

BUILD + REFINE YOUR STRATEGY

FOCUS ON THEM!

THANK YOU



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