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AIA Detroit Christopher Kelley Leadership Development Program 2018-2019 Cohort

Session 5: Closing the Deal

Date: February 1, 2019

Venue: SpaceLab Detroit

Scholars: Erin Porter, AIA, LEED AP BD+C + Kevin Bouchey, CGD

Session 5, 'Closing the Deal,' examined business development in design industries through the interrelated topics of marketing and sales techniques, bringing on experts in those fields to offer their lessons and perspectives from working with designers and professional firms. The session focused on the importance of generating and maintaining projects / attracting clients that are consistent with the core values and strategy of the organization. The session closed with an informal 'show + tell,' with scholars sharing selected marketing materials from their respective firms.



Lydia Michaels, founder and CEO of Blended Collective, a multicultural marketing and brand consultancy, opened the session with a presentation focused on marketing and branding strategies for the design industry. Lydia's unique approach to branding aims to



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provide a diverse, multi-cultural approach, and her presentation largely focused on how to build a brand authentically, with particular attention to 3 topics:

1. Strategies/ methods
2. Attract new clients
3. Attract new talent

In order to build an authentic brand, Lydia emphasized brand discovery (with an emphasis on identifying and building on core values), brand positioning (researching and recognizing other's perception of your organization), and competitive advantage (recognizing what makes your firm unique). She also pointed out that as firms grow or change over time, this is a process that may need to be revisited and adjusted to bring into alignment with those changes. Lydia also stressed the importance of identifying the target audience and using a targeted approach to present a clear strategy to authentically connect with the right people. She encouraged us to "be consistent with your brand," and stressed that the "brand environment" – from business cards, to websites, to the product you deliver – should feel the same across the different mediums.

On the topic of attracting new clients, Lydia recommended connecting with key leaders within industry niches, building long-term relationships, and positioning yourself and your firm as thought leaders. Scholars also learned the concept of inbound marketing, a more targeted approach than traditional marketing, one which creates content for a specific audience. This may utilize big data, but stresses "business intelligence" to interpret and apply the findings.

Lastly, Lydia presented the keys to attracting innovative and creative new talent. Mentorship, training and leadership/ career development all play a part in talent attraction and retention. A 30-30-30 model was outlined – where 30% of your network consists of peers to bounce ideas off of, 30% are professionals above you who can serve as mentors, and 30% are professionals earlier on in their careers, who may benefit from your mentorship. With these guidelines, the cohort gained knowledge and skills to represent themselves, their firms, and their work in a genuine way that resonates with their target clientele.

During the second presentation of the session, Matt Stephens, Sales and Leadership Coach with Gary Weinberg & Associates, presented the Sandler Sales process to the cohort, introducing communication as the fundamental basis for establishing a consultative approach to selling services. The importance of listening and asking questions was underscored as a technique to establish a rapport with clients. Similarly, Matt presented personal accountability as another building block of establishing trust – scholars were encouraged to routinely "self-rate" their own level of accountability in order to avoid the pitfalls associated with common selling challenges, particularly when there are no clear next steps. Scholars learned about the importance of up-front contracts – establishing a mutual agreement between parties regarding what the next steps are, so that both parties feel that they occupy equal business stature.



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Echoing some of the messaging from the previous presentation regarding retaining and attracting staff, Matt presented 4 activities of leaders:

- 1) Train
- 2) Supervise
- 3) Coach
- 4) Mentor

Additionally, the cohort was introduced to 3 business strategies (which may overlap in some fashion but it's unlikely that they will be equal in all parts):

- 1) Innovative
- 2) One-stop-shop
- 3) Customer service

Chasing the right work was presented as a function of being able to identify which of those 3 services represent your firms' approach; part of selling your product or services entails understanding your role in communicating company strategy; understanding structure and process – and asking yourself; are these being documented and implemented?

Lastly, Matt presented a distillation of buyer motivation as essential for effective sales techniques – understand emotional drivers of purchasing, as well as the subsequent intellectual rationalization; find out what's important to buyer; manage what you can control (your actions); as a problem solver – look for problems to solve.



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Matt's presentation was highly participatory, often illustrating his talking points through interactive means. For example, scholars were asked to close their eyes, listen to a series of instructions on folding and tearing a sheet of paper. Upon the conclusion of the exercise, when prompted to open their eyes and compare their results, the scholars were faced with completely different results – illustrating the importance of active listening and of asking questions. The presentation concluded with the emphasis on sales as the synthesis of structured process, personal accountability, and effective communication with clients.

During the closing activity, the cohort shared and discussion marketing materials from their firms. Materials included press releases, market-sector specific leave-behinds, RFP responses, and review of websites, including video content. Lively discussion also touched on social media approach, particularly Instagram, in promoting work and showing office culture. With a variety of practices represented, the comparison of approach to branding and marketing was easily comparable, and with the inclusion of scholars who represent clients and consultants, scholars were offered feedback on these marketing materials from multiple vantage points. The highly visual nature of the content, combined with the more casual setting to conclude the session, allowed for easy-going yet constructive commentary.



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Overall, the session presented marketing and sales as rooted in self-awareness, process, and authenticity. The cohort learned methods and techniques for strategic planning, and received valuable feedback from peers regarding the marketing materials from their own firms.