



**The Client-Focus Rigor Wheel**  
***Strategic Account Management***  
***for the AEC Industry***

**Diane Cullen-Levin**



## *The Client-Focus Rigor Wheel*

*For all the wonderful people who got into this industry and thought all they had to do was design, engineer and build!*

Cover Photo by [Steven Wright](#) on [Unsplash](#)

*Thank you Steven for sharing your talent!*



**THE CLIENT-FOCUS RIGOR WHEEL**  
***Strategic Account Management***  
***for the AEC Industry***  
***By Diane Cullen-Levin***

**Preface**

When I got into the field of commercial architecture; I had no idea that I would have to sell to advance my career. Plus, I am a baby boomer, there were ten people in line interviewing for every job I interviewed for. I had to differentiate myself.

I started out in programming and planning and quickly became a project manager. I have always been a “connector” bringing people together, volunteering and getting involved, so I started there. To stand out from the crowd I constantly challenged myself to get out of my comfort zone. By the time I was 30 years old, I was leading a branch office of a Los Angeles commercial architectural firm. I had to manage the staff and bring in business.



## *The Client-Focus Rigor Wheel*

I met my husband at this company, he was in the headquarters office and we moved to the East coast after we married. A few years later we founded our own firm in Washington, DC. Once again, using my skills to manage staff and bring in business.

Relationships Matter™ became my motto as I realized that the stronger my relationships were with clients, consultants, vendors, etc. the easier it was to get through a crisis (and there are many in architecture and construction) and I felt extraordinarily happy when a project was completed to meet the goals of those individuals. It is simple, not easy. . .

I hope you enjoy and learn from the Client-Focus Rigor Wheel!

***Success is not final, failure is not fatal; it is the courage to continue that counts.***

Winston Churchill



## **Rigor | Relationships | Focus**

***Rigor*** is a word many people do not like. They associate it with something difficult, like running a marathon. In truth, the word *rigor* has been used in education for many years. Educator Robyn Jackson, PhD teaches that a learning environment with rigor involves having students think for themselves. By making meaning for themselves, students impose structure on their information, organize it, and bring their individual skills together to create a process. They can then apply what they learn in new and novel situations. This definition of *rigor* is exactly what the **Client-Focus Rigor Wheel** is about.

Building relationships is hard: it requires consistency, care, and objectivity—all words associated with rigor. Relationship-building is a truly professional skill, one not learned in school.



## ***Relationships Matter™***

The isolation created by the COVID-19 crisis emphasizes the importance of interacting with others, in personal *and* business relationships. While the traditional handshake may never fully return, clearly *relationships matter*. Connection, whether virtual or in person, is an indispensable aspect of our lives.

Professional services are relationship businesses, defined here as those that offer specialized knowledge. These include not only lawyers, architects, engineers, and accountants, but also consultants, construction managers, and technology companies. These businesses are not selling “widgets” (products you can see when you purchase them). They are selling an intangible: expertise. Even if there is a product at the completion of their services, the purchaser of those services does not always completely understand what it took for them to go from start to finish.



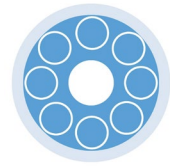
Many professional service providers dislike the word “sell.” They did not get into their profession to “sell” and probably had no idea it would become a part of their professional lives. Yet “selling” expertise is crucial to acquiring and retaining professional services clients. People engage professional service providers based on trust, referrals, and the reputation of the company and its people. They are businesses where *relationships matter*.

**Client-Focus** describes the culture within a professional services company where maintaining client trust in their professional people is paramount. These are companies that:

- Put their clients first.
- Solve the problems their clients need solved.
- Provide objective advice that is to their clients’ benefit.

The **Client-Focus Rigor Wheel** is designed to help your organization systematically build and sustain trusting relationships with your clients for the long term.

## The Client-Focus Rigor Wheel



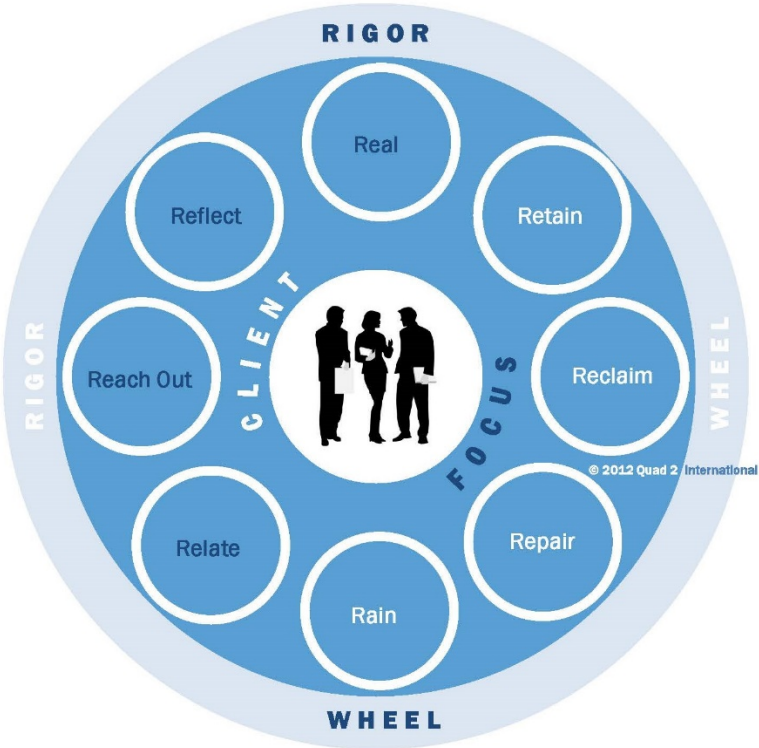
The Client-Focus Rigor Wheel is a system of establishing, building, and maintaining relationships with the *right* clients. A professional services organization is typically a doer-seller model: they have the technical knowledge to *do* the work and need to *sell* the work to attract new clients. The most successful doer-sellers are technical experts who are also translators: they can convert the technical aspects of their work into layman's terms. They have the depth of knowledge to answer questions from their clients, sharing enough of their technical expertise to demonstrate credibility. In addition, they have enough empathy to show they are humble and understanding of their clients' needs.

The intent of the Client-Focus Rigor Wheel is to evaluate and analyze each spoke of the wheel annually as part of your regular strategic planning.





# The Client-Focus Rigor Wheel





	<p><b>REAL</b> <i>Be real: know who you are &amp; who your “ideal” client is</i></p>
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Being REAL starts with your company culture. It is the unique personality that retains employees and attracts clients. Every company has a heart and soul. Many companies have Mission and Vision Statements and Core Values, often shared on their websites.

***How many companies truly “live” their core values?***

Your company must be able to articulate its values *and* incorporate them into everyday life, making them part of the organization’s culture.



Several other factors fall into the “know who you are” part of **Real** and include:

- Defining your differentiators and value proposition.
- Identifying your competition and how you and they rank within your industry.
- Training and educating your doer-sellers so they can fluently share your firm’s values.

## Living Your Core Values

Moz (an SEO company) offers an excellent example of **Core Values** in action. With the help of a facilitator, the Moz management team identified the Core Values that best fit the company’s unique culture. To live by these values, everyone in the company would need to know them, easily recall them, and use them daily.

Moz invented a word for their Core Values:

“TAGFEE.” It stands for: TRANSPARENT | AUTHENTIC | GENEROUS | FUN | EMPATHETIC | EXCEPTIONAL. Not only did this made-up word help the Moz staff remember their Core Values, it also created a way to help their clients and others learn them.



### ***Do you know the Core Values of your company without looking them up?***

Shortly after they developed their Core Values, Moz had a momentary breach in their system, although they were fairly certain no data were compromised. In discussing the situation, their team immediately revisited their Core Values. They knew they would tell their clients about the breach, because *transparency* is one of those values. They did inform their client base, and in so doing they not only lived up to their Core Values, they also endeared the company to their clients because they were honest, truthful, and *transparent*.

## **Your Ideal Client**

### ***Do you know who your most profitable clients are?***

Not market sectors, but *clients*? Many professional service providers do not track their work *by client*. It is often tracked by office location or market/industry sector or service line. In fact, sometimes a client can cross all three of those categories. Companies also sometimes track clients by project name, with no direct connection to that project's client.



Sharing client relationships across your company, whether by geography, market sector, or service line, is critical to strategically growing your business. For example, your company may have a resumé that includes building hospitals. Many hospitals are part of a larger health system and knowing how much work you have done within that health system across the nation is as important as knowing the individual specialties your company has built for, such as operating rooms, emergency departments and radiology laboratories.

Being able to sort your database *by client* is essential for a full understanding of each *client's* revenue and profitability. Your **Ideal Client Profile** should include financial data, typical scope of work, reasonable contractual terms, and strength of relationship. Typical ways companies track client data are:

- Top Ten Clients
- Key Client Lists
- A grading system (e.g., A+, A, B and C clients)

However, you choose to do this, what matters is that you do it, to help you gain a deeper understanding of your clients' value in more than a single area.



An example that underscores this occurred with a general contractor client of Quad 2 International. A financial analysis found they had their largest revenue within one vertical market sector. However, a closer look at the data revealed that the revenue within that large market sector was from only one client. Moreover, this client had one of the contractor's lower profit percentages, and the experience of working with them was poor.

There are three issues of concern with this type of client:

- While a high volume of revenue is nice, when it is combined with a low level of profit it is not a good investment of your company's time.
- A difficult client will burn out your team members, causing them to perform poorly or even leave for a better working environment.
- Most importantly, having one client as a large percentage of your annual revenue is dangerous and not sustainable. What happens if that client decides to take their business elsewhere, or changes their model such that they no longer need your services?



## Identifying Your Ideal Clients

Your company's leadership must have a clear and consistent view of its Ideal Clients, beyond revenue and profit. Developing and documenting an Ideal Client Profile is prudent. There are several factors that contribute to creating a complete profile. Many of them have to do with intimately knowing your own company.

Develop your Ideal Client Profile by identifying the data that represents the following:

- The type of work you excel at and the characteristics of that work.
- The value you bring to your clients—include both the value *you* believe you bring, and the value *clients* have specifically told you about.
- The synergy you have with your clients, such as core value alignment, community engagement and innovation.
- The financial and contractual relationship you desire, e.g., profit margins, payment terms, reasonable contract terms.

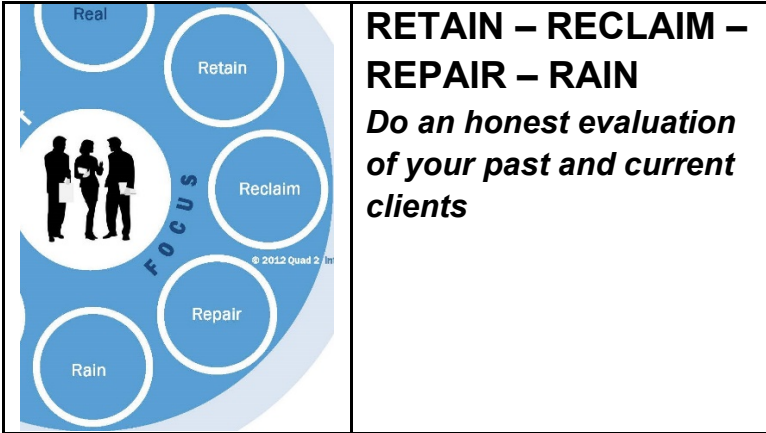


## *The Client-Focus Rigor Wheel*

- The characteristics that lead to a predilection for a long-term partnership.
- The appropriate behaviors and attitudes your team members and your clients' team members should share for a good working relationship.

The Ideal Client Profile can be transformed into a grading system, similar to a LEAN business model that implements processes for optimum business efficiency. The grading system is a quick and easy way to rank your clients as Tier I, Tier II or Tier III to see how closely they meet your “ideal” criteria.





Professional Services clients generally fall into one of these categories:

- The clients you currently have and want to **RETAIN**
- Past clients you have ignored and need to get reacquainted with and **RECLAIM**
- Unfortunately, it happens, something goes wrong, and the relationship is affected and needs **REPAIR**
- The clients you have never worked with and believe would fit your profile, aka "making it **RAIN**"

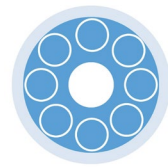


Each of these client types needs to align with the elements of your Ideal Client Profile. If you have developed a rating system from your profile, they need to meet at least a Tier II level.

## **Relationship Strength**

One of the most important characteristics of an Ideal Client is the strength of the relationships between your organization and theirs—especially the strength of your relationships with that client’s decision makers. How do you know if a business relationship is strong? Determining how to quantify relationship strength, a qualitative factor, is the first step. Once you have that in place, assess who, within your organization, has relationships at the client organization. This is aligned with the concept of “six degrees of separation” – any two people are only six or fewer acquaintance links apart.

Along with relationship strength, having a “many-to-many” relationship is important—several people within your organization should have relationships with several people within the client organization.



Why does this matter? If one person in your company is the sole person who has a strong relationship with a key decision maker in the client organization, and that person wins the lottery and leaves your firm, or worse yet, leaves to work with a competitor, your company could lose most of the business from that client. It can work the other way as well—if your firm focuses on having a strong relationship with only one decision maker within the client organization, and that person leaves, you risk losing their business because you have no other strong relationships there. The following example is a good illustration of this concept:

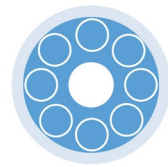
Quad 2 International was working with a general contractor. We had developed their Ideal Client Profile and they had identified a new strategic client they wanted to pursue. After defining relationship strength levels, we surveyed their office and field staff. We learned that a young employee in their accounting department was dating someone whose mother was the head of planning at the client organization! Had we not done this exercise we probably would never have known about this connection, which further strengthened their ability to establish strong relationships with the client.



Everything you have accomplished in the **Real** spoke of the Rigor Wheel leads you to identifying the clients you want to **Retain**. The most important aspect of the **Real** phase is to be completely honest and to focus on the previous three to five years of clients, not just current clients.

Using a cheeky analogy from Marie Kondo, the organizing consultant: your **Ideal Clients** should bring you joy!

During your **Real** analysis, you might have discovered clients that could reach the Ideal Client level. When looking deeper, sometimes you find a need to educate these clients on the full breadth of services you offer. We often assume that our clients know all we are capable of and excel at. Especially with technical expertise, we tend to think of what we do as ordinary and do not think to share it—yet our clients may think it is extraordinary!



A good example is one of Quad 2's clients, a global general contractor. They had a master services agreement with a healthcare campus for sustaining work (ongoing small project work). One intent for any contractor doing sustaining work is to establish credibility with the client, in the hope that they will think of the contractor and hire them for larger or more complex projects. Yet this strategy often fails. Why? Large health care campuses, higher education institutions and large corporate clients often label these sustaining work contractors as only capable of performing smaller facilities work.

Quad 2's general contractor client had never built a large project for this healthcare campus. When they heard about two large new projects that were in the pipeline, with Quad 2's help they assembled a **Client-Focus Team** and educated the healthcare client about their experience with building much larger projects. As a result, the contractor was considered for both new projects.



	<p><b>RECLAIM</b> <i>Re-engage with your inactive clients of value</i></p>
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According to *Harvard Business Review*, acquiring a new client is anywhere from five to twenty-five times more expensive than retaining an existing one. This matters, but *only* if that existing client is an Ideal Client for your company.

It can be difficult to stay in contact with an inactive client. But if that inactive client meets your Ideal Client Profile, it is important to establish and implement a plan for engagement.

Creating a “maintenance” plan for staying connected does not take much time to implement. There will be clients you contact annually, bi-annually, or quarterly. The timing and level of engagement depends on several factors such as the timing for upcoming funded project work, the size and scale of this client’s typical project and variety of common interests you and each client share.



	<p><b>REPAIR</b> <i>Keep key client relationships strong</i></p>
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It is human nature to avoid confrontation, no one wants to hear they messed up. Yet doing so jeopardizes potential future work with great clients.

An architectural firm Quad 2 worked with had completed a project for a hospital in California fifteen years before and had not engaged with the client since that time. The client was planning to build a replacement hospital as well as a new children's hospital, but had no reason to consider this architectural firm, since their relationship was so far in the past. What caused the firm to ignore this client for so long? They thought the earlier project had ended on a bad note, and instead of resolving the issue, they ignored it.



It is a matter of course that things go wrong on construction projects. There will be issues, even with the most diligent care and planning. Having strong relationships with your clients and partners can get you through those difficult times more easily. Although no one likes confrontation or to hear bad news, ignoring such situations is not good for any firm's reputation. The stronger the relationship with a client, the easier it is to get through a difficult situation.

The architectural firm was lucky, they learned about the new projects in enough time to reconnect and repair their relationship with the client. Had the client been on a reclaim maintenance plan, they might have had more time to connect with the client.

With Quad 2's help, this architectural firm was able to re-engage with the hospital, develop new and stronger relationships, and ultimately win a contract to design one of their new facilities.

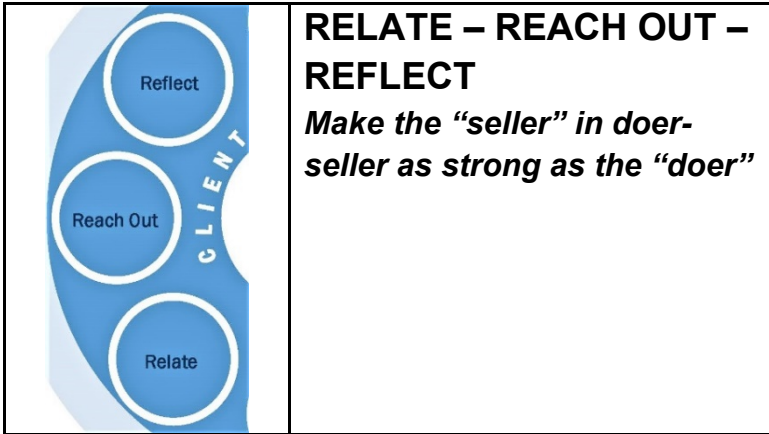
Client Relationship Management software (CRM) is a fantastic way to track your activities with your retain, reclaim and repair clients.





Remember the 80/20 rule: get 80% of your work from 20% of your clients. That 20% are your Ideal Clients.

“Making it rain” means taking control of your future work. “Targeting” strategic new clients is meant in the nicest way: research, evaluate and purposefully build relationships with new clients that you believe meet your Ideal Client Profile—those in the bull’s eye or “target.” Do not respond to requests for proposals that are outside of your core competency simply because the potential client is the hottest company out there, the project is sizable, or you want that company’s name on your client roster. If the work does not meet your expertise, is out of your geographic reach, or if you have no relationships within this client organization, then skip it. Instead, spend that time on enhancing your relationships with the clients that fit your Ideal Client Profile.



This part of the Client-Focus Rigor Wheel is a purposeful change management process. Its goal is to engage doer-sellers in relationship building and maintenance, as well as in being productive contributors to business development. Your team will move out of their comfort zone through planning, tracking and accountability.

Professional Services firms know their client’s budget, time frame and desired goal. A broad range of expertise is typically needed to meet the client’s needs. Your firm’s leadership, through the efforts in the **Real** and **Retain-Reclaim-Repair-Rain** phases of preparation, should be able to provide the information needed by its professionals.

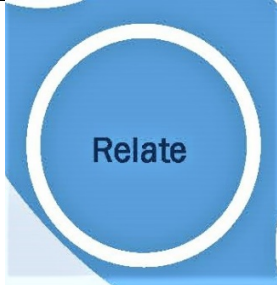


Information such as:

- the attributes of an Ideal Client
- the messages to convey about your firm's values
- the clients in each category
- the definition of relationship strength
- the individual relationships to establish, enhance, and maintain

Many professional service providers are most comfortable when they are working with each other and with the client on their current project. This is an example of Stephen Covey's observation that we spend too much time in quadrant one: *Important and Urgent* and not enough time in quadrant two: *Important and Not Urgent*. Quadrant two includes those calls and meetings (in person or virtual) that are put on the back burner, usually because they are not only not urgent, but are also out of our comfort zone. The Client-Focus Change Management System can help change that.



	<p><b>RELATE</b> <i>Focus on specific clients &amp; develop a strategy</i></p>
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The first step of the Client-Focus change management process is about *relating*. Specific clients are selected from one or more of the client categories: Retain, Reclaim, Repair or Rain. People in your organization are designated into Client-Focus Teams. Each Client-Focus Team relates to only one client. This gives them a real-life experience that can be tracked.

The Client-Focus Team should receive training on all the services your company offers, and on how best to convey this information to clients. One way to do this is to create centers of excellence: groups of professionals within your organization that have expertise in a specific area. They can then serve as the “go-to” group for the latest trends and information related to that service area or market sector.

## *The Client-Focus Rigor Wheel*




The Client-Focus Team develops an action plan to reach out and connect with individuals at the client organization, and, if warranted, other organizations that also work with that client. For example, if your company is a contractor the team may include architects and trade companies that consistently work with that client in their plan.

The Client-Focus Team researches the client to identify existing relationships and what information those relationships can provide, including any knowledge gaps to be addressed. Any missing relationships or missing information form the basis for the team's action plan. The team then begins purposeful engagement with the client to obtain any missing information and/or to convey information to them about the services your firm can offer.

Leveraging relationships that exist between your company and the selected client, including other services provided by your company, is the first step in the Client-Focus change management system. Your doer-sellers have the credibility to develop the strategy and can be coached to implement the tactics.



 <p>Reach Out</p>	<p><b>REACH OUT</b> <i>Implement your plan</i></p>
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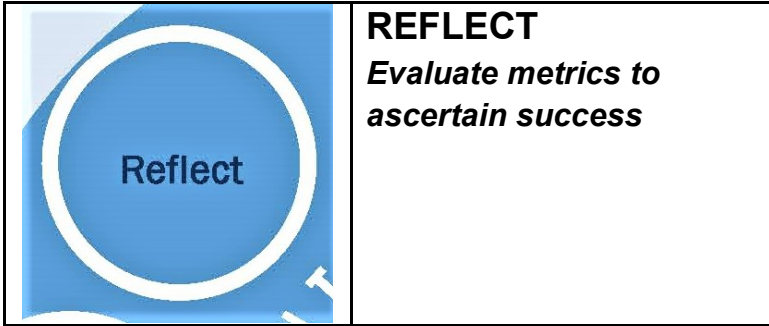
Implementing your plan requires coaching and accountability. It can be difficult to get doer-sellers to appreciate the value of Covey's quadrant two activities: *important and not urgent*. In his book *The Slight Edge*, Jeff Olson illustrates how the simple and consistent actions we take do not provide an instant reward; their benefit usually occurs in the future.

Doer-sellers are more likely to expect immediate change based on their activities. It is the coach's job to make them comfortable with playing the long game. The coach gently pushes them out of their comfort zone, perhaps by asking them to engage in a type of conversation they have not ever had, meet with a person they have never met or to connect with an individual over coffee, lunch, on the golf course or at an event.



A large health care company had been a consistent repeat client for an architectural firm for many years. Quad 2 was brought in to work with the architect two years after the healthcare client had hired a new CEO and an entirely new in-house facilities team. The architecture firm's Client-Focus Team consisted of a Partner, Project Manager and Designer, who, with Quad 2's help, crafted their plan and began to implement it.

One of the objectives in the plan was to obtain an organization chart. However, the Project Manager did not have any experience in business development. Only two months into the change management process, the Project Manager brought a handwritten organization chart to the Client-Focus Team Meeting. He had taken a client representative out to coffee and they had discussed the client organization; the representative had drawn the chart for him. The team evaluated the chart, identified some individuals who had not previously been in the plan, and added them to it. This Client-Focus Team changed the win rate with this health care client from 23% to 63% in less than eighteen months!



Metrics are included in the Reach Out and Relate plans. Many are qualitative metrics, and these are equally important for accountability. Each quarter, the Client-Focus Teams come together and, using these metrics, update their Client-Focus Team card with the progress they have made toward their objectives for the year.

At these quarterly meetings, teams share the new information they have discovered in their engagement activities. Objectives may be adjusted, and new ones added. The level of relationship strength is assessed based on new relationships that are being established, the growth of existing relationships and the process of making strong relationships even stronger. Won, lost, current and future project status is reviewed.

The objectives for each team always include a way to increase your firm's value to the client. Developing





creative ways to provide value beyond your core business is smart, and clients are appreciative.

After completing the **Real** phase, a Texas construction management firm strategically targeted a new health care client that they felt met their Ideal Client Profile. During the Client-Focus twelve-month change management process, the construction management firm's Client-Focus Team had over seven major engagements with the potential new client, including:

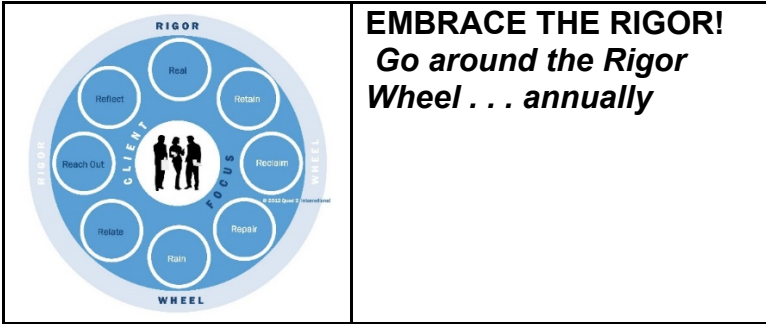
- Gave the client a tour of the construction management firm's offices.
- Organized a donation drive for the client.
- Implemented an activity within the children's hospital.
- Toured the client's facilities with client representatives on several occasions.
- Provided several pre-construction budgets to the client, including one for a \$100M project.
- Participated in a client-supported charitable fundraiser.
- Played in a charitable golf tournament with the client.



## *The Client-Focus Rigor Wheel*

At the end of the twelve months, because of these efforts the construction management firm won a small project with the new health care client. The Client-Focus Team continued their efforts and continued to win more and larger work from this client.

## The Client-Focus Rigor Wheel



Client-Focus is a culture-changing effort, and it takes a few years before everyone in your organization is on board with the commitment it takes to *Embrace the Rigor!* Make Client-Focus a simple, logical, and repeatable process and your firm will be able to sustain it.

Persistence and the small things we do each day make a difference in our future.

To quote Ernest Hemingway in *For Whom the Bell Tolls*:

***“Today is only one day in all the days that will ever be. But what will happen in all the other days that ever come can depend on what you do today.”***



## About the Author



Diane Cullen-Levin is the founder of Quad 2 International LLC, a strategic consultancy primarily within the architecture, engineering, and construction industries. Her mantra is *Relationships Matter™*.

Her signature program is the Client-Focus Change Management System based on the Client-Focus Rigor Wheel. Other training programs include:

Soft Skills | Improve Your In-Person Interviewing Skills | Win More Work Virtually | Client-Focus for Leaders | Client-Focus for the Field

Select clients include:

**SKANSKA**

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**umc**



**CONSTRUCTION**



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### **What clients' of the Quad 2 Client-Focus System say . . .**

*"Over this past year, I attribute over \$125M in new work to your Client-Focus program."*

**General Manager, Multinational Contractor**

*"I have taken everything you have shared with me about client relationship building and I apply those concepts each and every day."*

**Principal, Multinational Architectural Firm**

*"Based on your Client-Focus program with our Australian headquartered client, our Account Manager in the US now has a stronger relationship with them than our team which resides in Australia, and this is critically important to our future success with this client."*

**Managing Director of Client Services,  
Global Investment Solutions Company**

*"Our middle game with the four clients we have been focused upon has skyrocketed another 20%. I appreciate your continual commitment to our group and shaping a culture that will sustain the next era in growing our region with a solid foundation of client relationships."*

**Vice-President & Director of Business Development,  
Multinational Contractor**

*"I consider you one of our secret weapons. The coaching and accountability helping with our pursuits and prospects have been wonderful; not just wonderful but also fruitful. By raising the consciousness of us around certain pursuits things seemed to start happening, serendipity or more likely the electricity from your strategy were the cause."*

**Partner, Multinational Architectural Firm**



**CLIENT-FOCUS**

**Quad 2 International LLC**

[www.quad2international.com](http://www.quad2international.com)

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