

MARKETER



THE JOURNAL OF THE SOCIETY FOR MARKETING PROFESSIONAL SERVICES

VOLUME 37, ISSUE 1, FEBRUARY 2018

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Selling Like Silicon Valley

Executive Briefings Improve Customer Engagement

By Craig Park, FSMPS, Assoc. AIA

What if you could implement a marketing-driven client development program based on proven success in a highly competitive industry? For more than 30 years, Silicon Valley's best—including Apple, Autodesk, Cisco, HPE, IBM, Microsoft, Oracle, Salesforce—have used an innovative Executive Briefing process to engage customers, strengthen business relationships, positively influence sales, and help their clients buy more and buy faster.

What's more, based on 27 years of surveys with over 1,000 companies using the Executive Briefing process:

- 97 percent said it contributed to strengthening their business relationships
- 94 percent said it contributed to the likelihood of customers purchasing their services
- 91 percent said it helped increase the final purchase amount by an average of 40 percent
- 80 percent said it shortened the sales cycle by an average of 35 percent

As defined by the Association of Briefing Program Managers (ABPM), an Executive Briefing is a highly customized and customer-centric dialogue—usually held

in the host's headquarters or in a purpose-built facility. The dialogue occurs between key decision-makers from high-potential accounts and subject matter experts who have a high degree of business acumen, technical expertise, and a deep understanding of the customer's business needs and markets. An Executive Briefing offers an unparalleled opportunity for relationship-building, contribution to business results, and customer insights that inform future strategies and solutions.

Several years ago, while consulting on the technology-design standards for a national rollout of Executive Briefing Centers for Apple Computer, I had the opportunity to work with Ann Benett, now president of Benett Communications, a global consultancy specializing in Executive Briefing Centers and customer engagement programs.

Benett worked with Apple for 11 years, where she served as the manager of its Global Executive Briefing Center program. Since founding her consulting firm in 1999, Benett has advised more than 50 companies on how to create, implement, and operate effective Executive Briefing programs. Recently, she shared insights into the process and how those of us in the A/E/C industries can apply it to our own customer engagements.

"Beyond just the tech sector, you've now got hundreds of companies deploying Executive Briefing programs, from Boeing and Airbus to Accenture and Fidelity Investments," she said. "You've also got several in the A/E/C sector, including Autodesk, Deltek, Schneider Electric, UTC, and Johnson Controls."

This is professional services redefined and a significant sales strategy that A/E/C marketers and business developers can learn from to improve bottom-line results, and it can be applied to both prime- and sub-consultant client relationships. Companies with Executive Briefing programs are not just selling smart widgets or some other transactional product, they are positioning their



UPMC Center for Connected Medicine-Lobby ©Ed Massery photographer

offerings of enterprise-wide professional services—to the tune of multi-million-dollar contracts on the scale of many construction projects—for the concept, design, implementation strategy, integration, service, and support of their solutions.

The first Executive Briefing program was developed in the mid-1980s by Xerox®, followed quickly by IBM, then Apple, then many more. Today, for many national and multi-national firms, Executive Briefing programs have become the global standard across multiple industries.

Why Executive Briefings Work

Benett noted, “First, you should think of Executive Briefings from a sales or business point of view. A briefing at your company headquarters is a super sale. This is a sale on steroids. The tech industry has shown that an Executive Briefing does six months to one year of business development in a day.” She added, “You can meet at a client’s office and even bring a designer or a technical expert, but that meeting is often limited in impact. If you bring key executives

from a potential client to your company’s headquarters, you can give them an experience that they can’t just get on a regular sales call. They will meet your best and brightest: the people who are aligned with what their needs are. You can show them that you’re not just a partner for today, but a partner for tomorrow and that you’re planning for and developing solutions for the things that keep them up at night right now, and better, the things that are going to keep them up at night three to five years from now.”

Benett noted that the best Executive Briefings rely on a simple three-part strategy for success:

- **Experience** – Create an event that is customized, valuable, and memorable for a specific client or client-type
- **Environment** – Hold it in a place that is energizing, collaborative, and a brand showcase for your company, using technology that sets you apart
- **Program** – Deliver content that includes your unique people and processes, and prepare to deliver a world-class and memorable experience

Strategic Account Relationships

Benett noted that most sophisticated programs have a tiered briefing model, scaled to meet the needs of different-size clients. Using the Pareto Principle — where 80 percent of your revenue comes from 20 percent of your clients—you can rank potential customers as platinum, gold, or silver. Then you can focus your efforts on those top tier customers. She used the analogy of inviting them to your home, where you get everything ready, serve the best food that the guests will enjoy, and think about the relationship you have with each guest and what will make the day a valuable experience for them.

Benett added that most companies making large capital investments recognize the value of professional partnerships and commit to spending at least a half day, sometimes multiple days, to work out a business challenge. The invitation to an Executive Briefing should be framed around solving a potential client’s particular business challenge or need and as investment of their time. The most effective approach is to do your homework upfront to understand the



customer challenges, and then have a working session, envisioning workshop, or a discovery session with the client. She noted that it's not about coming in putting on a smooth performance "dog-and-pony show" where you know exactly what's going to happen. A great Executive Briefing is a facilitated discussion on needs and opportunities, and challenges and solutions.

"Through really listening to the 'Voice of the Customer,' you are creating trust. We all want to be partners and trusted advisers. That's done through having a conversation—listening as much as telling," Benett concluded.

Developing Scalable Solutions

While many of the companies with briefing programs are large—many with a billion dollars in sales or more—there are lessons to be learned and strategies to be applied that can work on a smaller scale.

While many briefings are held in a formal "Executive Briefing Center," many go by other names, including Customer Engagement Center, Vision Center, Customer Experience Center, Innovation

Center, Customer Collaboration Center, or Technology Center. Whatever the name, it should reflect what you want to achieve. The space itself can range from a simple—though well-equipped and provisioned—conference room to a more purpose-built facility with meeting and demonstration and exhibit spaces.

Benett said, "It's not the place; it's the people," adding, "You have to make sure that there's enough 'there' there, but it is not just the facilities. The space needs to reflect your brand, but it doesn't have to be over the top. If you're a small company, you want to make sure that the right people are there to meet with your guests. For example, your CEO should attend the dinner, if not participate in the whole meeting."

Executive Briefings work for both public- and private-sector clients. While hosting companies underwrite the costs of staging the Briefing, most customers pay their own way to participate. They come because they understand the potential value. The host will need to understand the laws and protocols for the various audiences, along with any rules and guidelines governing their industry.

Marketing is all about the customer journey, and an Executive Briefing is just one milestone on that journey. It takes serious preparation to be effective. Key client issues need to be researched. Subject-matter experts must be sourced, vetted, and rehearsed. The hospitality aspects—transportation, arrival, meals, entertainment, etc.—must be coordinated. Facilities need to reflect your brand and your culture. Technology should support and enhance the briefing. The schedule for the day is critical. Plan an orchestrated series of conversations that can also

include fun (e.g., golf) or meals. Benett noted that what happens is as equally important as follow up afterwards, so the Briefing is not seen as an isolated event.

Benett emphasized, "Innovation is bringing the future to the present." She suggests that the last session of the day not be just a summary, but rather a facilitated dialogue on the next steps for co-creating innovative solutions, based on the preceding conversations. Questions such as: How do you want to move forward? Where do you see things happening? What's your timing?

If possible, put numbers, timing, and commitments on the table as you wrap up the day. She advised, "Don't just thank them and then expect customers to come back in a few weeks and say 'Hey, we want to go forward on this'." Frame the conversation around innovation and your approach or processes in ways that help them meet their business challenges and get their commitment at the briefing.

Strategic Thinking Is Key

Selecting which clients to invite to a briefing is a strategic decision. Benett noted that most briefings rely on the business development person or team to invite the potential client organizations and help them understand the value that the briefing can bring. The briefing manager proactively works with account teams and business development on availability of both facility and subject matter experts. Briefings are often scheduled several months out, to ensure enough time for planning and sourcing the right people, but the manager is always ready to help last minute opportunities.

Benett added, "I always like to have a little bit of a surprise element in each

Figure 1. Infographic: Briefings Strengthen Relationships.

BY THE NUMBERS:

What customers say...*

96%

They were very satisfied overall with the briefing they attended (rated 4 or 5, on a 5-point scale)

Their expectations were exceeded by the briefing

92%

92%

They would recommend the company based on their briefing experience

Their briefing contributed to strengthening their relationship with the host company

87%

75%

The briefing influenced their purchase decision

The amount of their purchase increased as a result of information provided in the briefing—by an average of 36%

72%

71%

They made a decision to purchase services discussed in their briefings

* Data from external customers in the 2017, 27th Annual Multi-Client Study on the Role of Executive Briefings, conducted by Decision Analyst Inc. for the Association of Briefing Program Managers (abpm.com)

briefing—I call it WWTR—What Will They Remember.” As an example, when Stanford University visited Apple, their employees (who were also Stanford graduates) were invited to attend the pre-briefing dinner. This gave the guests a deeper connection to the company, and it was well received.

Another approach is to invite three or four clients of similar size—but not direct competitors to each other—to the same briefing. Benett noted that some companies host multiple clients, inviting five to 10 (non-competing) clients at one time, like an advisory council. She suggested thinking from an outcome basis: “What do we want after this meeting?” If one or two participants are already clients, it can help reinforce your message. Benett commented, “Multi-client briefings are a great way to maximize your resources. We are seeing a lot of world-class programs use this as a strategy.” She added, “The discovery that happens out of these conversations is phenomenal. You’re creating great energy between your clients, as well as communicating your value to them.”

Factors for Briefing Program Success

Based on the annual ABPM Multi-Client Survey, Executive Briefings are the highest-rated source for obtaining information about solutions that benefit customers’ businesses. (See Figure 1. Infographic: Briefings Strengthen Relationships.) The most important elements are knowledge of discussion leaders (the speakers or executives or subject-matter experts), relevance of content, and presentation skills of discussion leaders. Respondents also rated helpful center staff as important. The most frequently mentioned consistent suggestion for improved performance is to strengthen content or customization.

For those considering adding a briefing program to their marketing mix, Benett suggested that host firms focus on four key factors in planning and operating one:

1. Management. Executive Briefings are valued for their business impact, and are part of the company’s overall

sales and marketing strategy. Host participants are valuable brand ambassadors of the company, as well as subject matter experts.

2. Customer experience. Each briefing is highly customized, with a strategy in place for engaging the customer and moving the relationship ahead. They’re actively managed by the host, and the voice of the customer through valuable interaction is cultivated. Technology and content align with the host’s brand positioning and demonstrate consistent messaging.

3. Program planning. The sales and business development teams should plan for briefings as part of their sales strategy. A formal speaker training program ensures resources are prepared and professional. Optimized processes drive efficiency. In-house service level agreements, and roles and responsibilities are clearly communicated.

4. Measurements of success. Metrics show value to the host company. Immediate feedback gives a snapshot of the Briefing’s effectiveness. Integrated software tools are used for planning, management, and reporting. Sales closure and survey process focus on business results—the highest value of an Executive Briefing.

The lessons learned from the forward-thinking companies highlighted here can be applied to marketing and business development efforts across the A/E/C industries. Whether you are a large, mid-tier, or small firm in A, E, or C, adopting and adapting marketing ideas from outside our industries—like the Executive Briefing process—to your marketing programs can yield impressive results. Executive Briefing programs offer new opportunities for relationship-building that contribute to improved business results and new customer insights to inform future strategies and solutions. ■

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Multiplicity: The Secret to Great Marketing Campaigns



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Lessons Learned From Building a New Website



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A Survey of A/E/C Video Marketing



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Corporate Social Responsibility and the New Architectural Era



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Don't Be Surprised by the Future



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Work Where You Want to Work: Six Key Attributes To Consider in Making a Change



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Reality Check: Discussing Burnout in Our Ranks



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How to Become a Communications Leader



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