

marketer

Volume 33, Issue 4, August 2014

The Journal of the Society for Marketing Professional Services

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Looking Back: SMPS at 40

BY NANCY EGAN, FSMPS



Society for Marketing
Professional Services

Decades before Seth Godin talked about finding your tribe, an intrepid group, united by their unlikely roles as marketers in professional services firms, came together in a series of meetings. At first, it was just to talk about what they were doing. Although as Janet Aubry, an early participant, recalls, “Nobody in our firms wanted us to be talking, especially since only a few firm partners thought marketing was a good idea at the time.”

But they kept talking, built momentum, and found other members of their tribe. It wasn't that long before the legendary meeting when the group decided to formalize their association and founded the Society for Marketing Professional Services, having flirted with calling themselves the Society of Birddogs or SOB's (as the apocryphal story goes.) Like most origin stories, in hindsight, it all seems to make logical sense. Like-minded people come together to share ideas, word gets out, and the organization takes off.

Except that, as [Marjanne Pearson](#) explains in “The Cusp of Change” chronicle (see page 13), the 1970s were no ordinary time for this kind of activity. The professions were changing, but not without a struggle. [Andy Zinsmeyer](#), the first executive director of SMPS, said in a 1979 interview in *SMPS News*, “The firms were *definitely experimenting*, and we were trying to prove the validity of having a non-technical employee responsible for a business development program.” This was a mild version of what early marketers were doing.

“The things we did—‘illegal’ ... ‘unethical’ ... ‘unprofessional’ by 1970 standards—are standard today.”

Joan Capelin, Hon. AIA, FSMPS, a founding member of the New York Chapter, is more candid in describing what she and Lou Marines, who went on to become the chief executive officer of the American Institute of Architects (AIA), were doing at HLW International at that time. “The things we did—‘illegal’ ... ‘unethical’ ... ‘unprofessional’ by 1970 standards—are standard today. Actually, ‘unprofessional’ was a charge you could fling at a firm or person in the 70s, even into the 80s, and it would stop them cold in their tracks.”

While much of what the early marketers were doing was not technically unethical, even by the strict code of the AIA, it was unacceptable and unsettling. There were firms that had marketers or BD people, with Zinsmeyer citing Ballinger and Welton Becket, and of course, Vincent Kling hired Weld Coxe in the 60s. But these firms were the exception. **Diane Creel, FSMPS**, recalls that when she wrote her master’s thesis on marketing professional services in 1973, she surveyed more than 100 of *Engineering News-Record’s* Top 200 firms, and only six companies reported having full-time marketers on staff.

These outliers saw an opportunity. Bolstered by research like Creel’s, and with Coxe’s book, *Marketing Architectural and Engineering Services* in hand, they recognized the potential for a new, legitimate profession, and SMPS became their platform.

Clayton Christensen would see the founding of SMPS and the goals and actions of the early members as disruptive innovation: “Innovation that helps create a new market and value network, applying a different set of values, which ultimately, and unexpectedly, overtakes an existing market.” It’s a mindset that has served our Society well over the past 40 years, helping us to move beyond traditional boundaries and expectations, allowing the organization to grow and change over time. That disruptive instinct is also part of our DNA—what attracted so many new members in the 70s and 80s, the “Rebels with a Cause,” as **Kay Lentz** fondly refers to us. What exactly did SMPS do to instigate change?

Sharing Information

While it hardly seems radical today, sharing information with colleagues from other firms (aka “the competition”) was not the norm in the 1970s. The founding SMPS members did just that: They talked about what they were doing to secure projects, how they were organized, what was successful, and what didn’t work. From cold calling to public relations to proposal preparation



Architectural employee, Singing Telegram Performer—EHDD 1974. Courtesy EHDD.



Joan Capelin, Laurin McCracken, Jean Valence, and Julie Luers.



Jeanne Murphy, Bruce Lea, and Tom Page.

—small groups of marketers were gathering around the country to discuss ideas. Although firm leaders were wary of these conversations, they recognized that there had to be a better way to get work. “In the aftermath of the recession of the 70s, the most bruising of the prosperous post-WWII period, they were willing see what could be learned,” notes **Bruce Lea**.

Talk turned into teaching with more formal programs being sponsored by local groups that would become the first chapters.

Bill Viehman, AIA, LEED AP, both teacher and student in those days, observes, “There was an impressive willingness of members to ‘teach’ in the larger forum (chapter, regional, and national). We all shared knowledge and real-life, practical experiences to benefit our colleagues.” By the time I attended my first national convention in New Orleans in 1978, the educational program was organized with a range of programs and lively discussion sessions designed to address the issues of firms large and small.

Creating Careers

“When Tom Page was president, he helped us realize that SMPS had created the profession of ‘Professional Services Marketing,’” remembers **Laurin McCracken, AIA, FSMPS**. Importantly, the new profession was not a “one-size-fits-all” world. Members wrote the job descriptions for entirely new roles by doing and then teaching others what it took.

Janet Aubry, FSMPS, with Coxe as her mentor and a number of us as her sidekicks, trained dozens of newly minted marketing coordinators in the Coxe clinics and in SMPS forums. Not only did Aubry share knowledge of what the role entailed, she was a career inspiration, moving from marketing coordinator to director of marketing to partner in her firm.



On right: Karen Courtney and Pete Kienle.
Standing: Craig Holmes.



Back row, L-R: Eric Mott, Craig Park, Tim Barrick, Mike Reilly,
and Donna Corlew. Front row, L-R: Phyllis Boyea and Carol Adey.



Bill Morton, Nancy Egan, and Jeanne Murphy.

Others charted a new path for the old “bird dogs,” transforming the role into business development, which, in Lea’s words is “the art and science of finding leads, cultivating relationships and information, and maneuvering through a client’s process for selecting firms to design a project.” Some projects may still be awarded based on “old-boy” relationships or patronage, but far more decisions benefit from the sophisticated approach pioneered by early members.

A critical position shaped by SMPS members was the director of marketing. Although not everyone with the title performed the same function, the position and title had impact in firms, the profession, and the market. “It was a position to which members of the marketing staff could aspire. SMPS had created a career ladder,” McCracken adds.

Or, as Viehman says, “I think the emergence and acceptance of the CMO role can be traced back to the willingness of the senior peer group to share knowledge and ideas of a more progressive and accountable profession.” The move from the recognition of the importance of marketing to seats at the “C-Suite” table is far from over, but the ability of today’s marketers to play a strategic role in their firms derives directly from the bold career models of SMPS’s early leaders.

Certification

According to Zinsmeyer, SMPS envisioned a certification program, citing the importance of verified recognition—“being certified means something.” It took almost 15 years and some strife, but as Julie Luers, FSMPS, explains, SMPS leadership saw a cause. “The controversy surrounding the certification program kept many of us up at night,” Luers recalls. “I recall hours of debate in our national board meetings at that time. But we were committed to legitimizing our profession through a certification program, and to giving our members a shot at becoming shareholders in their firms; and we persevered. If you remember, some states did not allow stock ownership in an architectural or engineering firm unless you were registered or certified. Knowing that it would take time to build credibility for the designation, we jumped in anyway, and look at where we are today.” SMPS now boasts more than 800 Certified Professional Services Marketers (CPSMs).

Outreach

By the 1980s, SMPS had a strong foothold, chapters were being chartered, and local meetings were well-attended. Marketers knew what their audience and potential members wanted and needed. Cathy Edgerly

remembers, “The Los Angeles chapter meetings were one of the few places where people could hear marquee speakers from the client community—local leaders in development, education, healthcare—people our principals wanted to meet as much as we did.” There was a buzz building around the country. Smart programming, hard work, and tenacity helped raise the profile of SMPS and professional services marketing among a wide group, including the once doubtful.

“Marketing was rapidly becoming a 600-pound gorilla,” says Capelin. “In 1987–88, AIA took a hard, objective look at marketing in design firms through a survey with the catchy title of “The AIA Marketing Architectural Services Survey” that included commentary from Cox, Cox, Cox, and me, and I gave the summary of the findings at the 1988 AIA national convention in New York. The results showed that 85 percent of the firms recognized that marketing was important to their success; they planned to increase their still-tentative marketing efforts in the future. And nine out of 10 firms had a principal involved in some way in marketing. That could be golf-club memberships, but it was a start.”

“What SMPS became was the ‘voice’ of professional services marketing,” says Viehman. “It filled the void left by the various professional organizations. It became the equivalent of the AIA Large/Mid-size/Small Firm Round Tables, only accessible to a far broader range of professionals. The AIA, for instance, provided a discussion group for management, operations, and human resources, but was mute regarding marketing.”

Organization

At the heart of this emerging profession—with its growing impact, new career paths, and increasing sophistication—was the Society for Marketing Professional Services. Like many start-ups, the Society had successes and setbacks. Formally constituted in 1974, it took several years to incorporate and several more to develop a formal structure. By the time that our first executive director, Zinsmeyer, resigned in 1979, SMPS was ready to step up its

At the heart of this emerging profession—with its growing impact, new career paths, and increasing sophistication—was the Society for Marketing Professional Services.

game as a national professional association. Lucky for us, Jeanne Murphy, an early member and marketing professional, was ready to step in.

The headquarters, such as they were, moved from St. Louis to Washington, DC, and Murphy took on the role she was made for. For those of us who worked closely with her in those early years, it's hard to overestimate her contribution. "Jeanne became the executive director at a critical moment in our development," says Creel. "We were learning to function like a serious, national organization, moving beyond the early fiefdoms, chartering chapters, and taking on new challenges. She not only shared our vision, she gave us the support we needed."

From Alexandria, VA, just outside of Washington, DC, Murphy identified the resources SMPS needed, including a professional association staff, a good lawyer, and a good accountant. She found training for the incoming presidents, who, like me, had little idea of how to run a board meeting, let alone a national organization. And she knew the importance of ceremony and celebration, setting a high bar for what makes a great convention.

Steady executive leadership is important, but our volunteer leaders are ultimately responsible for charting the future of the organization. With strong personalities and equally strong opinions, more than one board meeting over the years has provoked heated debate, but as **Kenny Diehl** recalls, SMPS emerged as a strong organization.

"When I joined SMPS in 1982, the Board was composed of the officers and directors from each of the nine SMPS regions," Diehl says. "The total number of Board members could be as many as 14. Elections were generally contested and sometimes a bit testy. To eliminate regional rivalries, control expenses, and provide continuity of leadership, during my tenure on the Board, SMPS adopted its current Board format where all seven members are selected and ratified by the membership. This concept has provided strength to the organization over the years, and the cost savings have been reallocated to bolster our national staff."

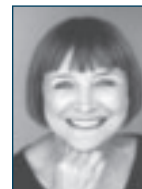
There are many more stories to tell than there is space in this edition of *Marketer*. It has been my great pleasure to hear from so many of the pioneering leaders of SMPS who generously shared their recollections. **Mike Reilly**, **FSMPS**, captures their value in his quote below.

"Musicians in every genre cite those who influenced their artistry," Reilly says. "SMPS members practicing the marketing craft have a similar story of influencers and inspiration. What I love about our now 40-year tradition is the immense opportunity to learn from the best in our business. Since I started as a marketing coordinator in 1985, I've met hundreds of influencers: chapter, regional and national SMPS connections, clients, authors, and fellow consultants. They share their individual brand of artistry, and I use it every day. To me, this is the association's greatest achievement."

As SMPS marks its 40th anniversary, the organization enjoys many of the comforts of middle age: a robust membership; strong, elected leaders and a capable, dedicated professional staff; a full schedule of programs locally, nationally, and online; a rigorous certification program; a cadre of well-regarded Fellows; a healthy Foundation; and the respect of the A/E/C profession. It is also a perfect time to celebrate our members' willingness to be less-than-comfortable, to take chances, and make certain that SMPS continues to be a positive, disruptive force in our markets. **m**

For more SMPS history, refer to "A Tribute to Weld Coxe" in the August 2011 issue of the Marketer and 1998 articles, "The Cycles of Change" and "Mapping the Evolution of the Marketing Model." Both are available on the Collaboration web site that I share with Marjanne Pearson: <http://nextmoon.com/smps-coxe> and <http://nextmoon.com/smps-1998>

About the Author



Contributing editor Nancy Egan, FSMPS, focuses on image and content development for firms in the design community. A regular contributor to several professional publications, she writes on workplace issues, urban design and architecture, and professional services marketing. A past president of SMPS, she can be contacted at egan@newwoodou.com. Nancy most recently contributed a story on the marketing department of the future in the June 2014 *Marketer*.



Back row, L-R: Eric Mott, Mike Reilly, Ron Worth, and Craig Park. Front row, L-R: Donna Corlew, Sally Handley, Phyllis Boyea, and Karen Courtney.

The Great Debate: What Marketing Really Costs

BY LIZ QUEBE, FSMPS

I was on the National Board of SMPS from 1990–1992, and was at a Board meeting bemoaning the fact that the new PSMJ Financial Statistics Survey had just been released and I would soon have the marketing costs section waved in front of my nose. The reported numbers were always several percentage points lower than my firm's annual costs, yet I knew we weren't throwing around our marketing dollars with wild abandon.

Mitch Levitt, FSMPS, convention planner extraordinaire, was in the room and told me to stop my whining (actually he said "bitching") and debate the subject. The thought of debating Frank Stasiowski, who was widely known and respected in the A/E/C industry, filled me with terror, but Mitch had it on the schedule before I had time to tremble. And to raise my anxiety level to new heights, Weld Coxe agreed to moderate the session. It was abundantly clear that I had some work to do.

So here is where SMPS connections paid off. I asked 50 firms of different sizes, practice types, and geographic locations, to tell me (with sworn confidentiality) their marketing costs for the past three years and what they were doing with those dollars each year. My marketing network came through, and provided me with great insights. The findings underscored the need to specifically plan and budget for a given situation in a given year, and not to market to a set percentage.

The debate was a turning point, certainly for me and for others as well, as the topic was of intense interest to many. I spoke on the results of my survey to many chapters, including Chicago, St. Louis, Atlanta, Upstate New York, Columbus, and Twin Cities. In 2002, I wrote a book on the subject, *Plan It*, just before I retired. I could not have accomplished this without the help of my SMPS colleagues, and was happy that I could shed some collective light on an important issue affecting the bottom line of every firm. ■

About the Author



Long-time member, Fellow, and Marketing Achievement Award recipient Lisbeth Quebe, FSMPS, is painting and pretending to be retired in Soldiers Grove, WI. Reach her at jlquebe@mwt.net.

"From Two-page Newsletter to Award- winning Journal: The Story of Marketer"

BY RANDLE POLLOCK, FSMPS

In the earliest days of SMPS, its only publication was a modest one called *SMPS News*. A newsletter if nothing else, it served the membership well, with some occasional think pieces and a good deal about promotions, job changes, and things like that, if not "babies, baseball, and birthdays." I was always impressed with it as a singular benefit of SMPS membership.

By the 1990s, *SMPS News* was rebranded as *Marketer*. In those days, *Marketer* published an eclectic mix of contributed articles but suffered from frequent editorial turnover, a lack of editorial direction, and mediocre design.

In early 1998, I saw a little ad that SMPS was seeking a new editor for *Marketer*. I immediately submitted a letter of interest and soon heard from the SMPS national president Tim Barrick, saying I had been selected. I wanted to up the ante, making *Marketer* a well-written, compelling, useful, and substantial publication that could be a source of pride for the membership and the Society, covering topics of professional interest to A/E/C industry marketing and business development professionals.

Since then, the publication has expanded from a few pages to a 40-plus-page, bimonthly journal of ideas and opinion. We've covered a lot of topics over the years, from focused conversations about brand, business development and strategy, to larger issues of CSR and sustainable marketing. When members have been polled on the benefits of belonging to SMPS, they consistently cite *Marketer* as the No. 1 benefit.

Throughout my tenure as editor (April 1998 until December 2011), my partner was Lisa Bowman, a senior SMPS staffer in charge of communications, who functioned as publisher (and recently left SMPS after 16 years). I also put together an editorial team of outstanding professionals—"contributing editors"—seasoned veterans, and emerging leaders who knew how to write, thought deeply about the profession, and helped move us forward as a publication. Together, we never missed a single deadline!

The once-fledgling publication quickly reversed the obstacles. We aimed high, applying a creative style and attitude that became *Marketer's* new brand. Whether reporting on emerging trends, chronicling success stories, reviewing books, questioning traditional marketing strategies, or "Flying with Eagles," our *Marketer* team was inspired to deliver great writing. We won recognition, even awards, and today, what you receive six times a year is the result of a team of committed professionals breaking the mold, aiming high, and reaching for the stars. **m**

About the Author



A former Society president and longtime editor of *Marketer*, Randle Pollock, FSMPS, is the science + technology director for HDR, based in Houston, TX. He can be reached at rande.pollock@hdr.com.



Jack Worstell and colleague—
HOK 1974. Courtesy HOK.



EHDD Partners George Homsey, Joseph Escherick,
Peter Dodge and Charles Davis, c. 1974. Courtesy EHDD.

The Cusp of Change

BY MARJANNE PEARSON

Forty years ago, the world was very different. Much of the technology we take for granted today was not available. There were computers¹, but not PCs like those launched by IBM and Apple in the 1980s. Our new tech toy was the handheld digital calculator. A few offices had telecopiers (early fax machines), long-distance calling was expensive, FedEx was new (1971), and we didn't yet have access to the Internet. It's amazing that we got anything done.

Globalization was in its early stages. The Vietnam War became known as the "living room war" because of the immediacy of news reports. The Arab oil embargo in 1973 led to a quadrupling of OPEC oil prices, and we had a stock market crash in the U.S. We were in the midst of disruption both at home and abroad.

The A/E/C world was changing, too. In 1966, the American Institute of Architects (AIA) commissioned a study by Case & Company². Among the findings of *The Economics of Architectural Practice* was this observation: "Most firms do not understand the significance of costs ... nor maintain adequate time and cost records." Furthermore, "The average architect loses money on one job out of four." Of course, the books were kept on paper using an adding machine. (No Microsoft Excel yet.) Large A/E/C firms had computerized accounting, but computer-based project reports weren't widely available.

Competitive bidding was an important issue, and a perfect storm was brewing. On one hand, government and institutional procurement

included price-based selection. On the other, professional associations had codes of ethics that included restrictions against competitive bidding, as well as advertising, offering free services, and other "unprofessional conduct." For instance, in 1970, the AIA adopted new ethical standards stating that "the architect should discuss scope and compensation with clients only after they had been selected on the basis of professional qualifications."

So A/E firm owners thought fees weren't high enough, a significant A/E customer segment wanted to select firms based on price, and the professional associations proscribed discussing fees with a client before a commission was awarded.

In 1966, a group of professional associations formed the Council on Federal Procurement of Architectural and Engineering Services (COFPAES) to educate Congress on the benefit of a qualifications-based selection process, working toward enactment of a public law changing the process.³

In 1971, the U.S. Department of Justice began legal proceedings against the AIA first and American Society of Civil Engineers (ASCE) in 1972, on the charge that their ethical standards resulted in a restraint of trade. Both the AIA and ASCE signed "consent decrees"—a voluntary agreement accepted in lieu of litigation, which restricted the organizations from imposing any standard or policy prohibiting members from submitting price quotations for architectural services.⁴ The codes of ethics were revised.

In 1972, the Brooks Act (Public Law 92-582) established a qualifications-based selection process (QBS). In 1975, the GSA issued Standard Forms 254 and 255, and that submission process became the standard for federal agencies, state and local governments, and other institutions.⁵

Weld Coxe's seminal book *Marketing Architectural and Engineering Services* was published in 1971, creating clarity for a generation that was adjusting to these changes. In "A Tribute to Weld Coxe" (*Marketer*, August 2011), Hugh Hochberg said, "At the beginning of an era of unrestricted marketing of architectural services, and with no precedent for what to do and how to do it, Weld developed concepts that are foundational to virtually all marketing of professional services today."

The timing of Coxe's book coincided with efforts by professional associations and business-focused entrepreneurs, using newly available technology, to develop better business practices within the A/E/C industry. AIA began working on new methods of developing fees (and agreements) based on the scope of work. In the late 1970s, Harper and Shuman developed CFMS (Computer-based Financial Management System) and the typical small-to-medium A/E/C firm had access to more sophisticated financial information. SMPS was established for marketers in 1974, and a few years later, the Professional Services Management Association (now Association of Business Leaders or AEBL) was formed, drawing a range of business and management leaders from across the A/E/C industry.

On the technical side, in 1967, Nicholas Negroponte founded the Architecture Machine Group at MIT. Computers were being used in architectural and engineering education around the world. The specifications process became automated in the early 1970s with CSI ComSpec® and AIA MasterSpec®, but at the same time, even sophisticated architectural firms were gathering standard details into manuals, rather than databases. (AutoCAD was not available until 1982.) Engineers were just beginning to use computer structural analysis on a large scale. SOM was at the center of these new developments, with undeniable contributions from Fazlur Khan⁶, who was a pioneer in tall-building structural systems. He collaborated with Bruce Graham to design the Willis Tower (formerly Sears Tower, constructed in 1974), which until 2013 was the tallest building in the U.S.⁷



Fazlur Khan (Structural Partner, SOM); Bruce Graham (Design Partner, SOM); Albert Lockett (Managing Partner, SOM); Louis Bruner (US Steel); Richard Lenke (Project Manager, SOM)
—Sears Tower Model, c. 1974. Courtesy K&S Photographics.

Amid this accelerating environment, with new attitudes about business fundamentals and technology to support it, the 1970s saw a new era for A/E/C firms. The new government procurement process leveled the playing field for a broader spectrum of A/E firms to compete for government design commissions, a national high-rise office boom began, and interior architecture became a lucrative market sector of its own.

As Bob Nilsson recently related, in the 1960s, the Baby Boomers turned the country upside down. In the 1970s, when they got into the business world, they didn't accept the answer that marketing was done by high-level people. This resulted in the transition of marketing leadership from people who were in their late 40s and 50s to a much younger and energized group of people. "The kids were looking for ideas and would share with others." It was a new world. [m](#)

About the Authors



Forty years ago, Marjanne Pearson, pictured here in a photo c. 1974, was learning the business of design at SOM SF. Her next step was a start-up design firm that grew from 15 to 85 people within four years, becoming a partner at the age of 31. She joined The Coxe Group in 1982 and started her own consulting firm in 1987. A contributing editor to *Marketer* since 2008, she can be reached at mp@nextmoon.com.



Robert W. Nilsson, a Vietnam veteran, was an early member of SMPS and construction industry executive. Today, he is actively rebuilding lives by helping injured vets launch construction careers with www.100entproject.org. Nilsson was profiled in the *Passages* section of *Marketer*, in February 2011 (available at www.nextmoon.com/nilsson). He can be contacted at robertn802@mac.com.

Footnotes:

1 That Mad Men Computer, Explained by HBR in 1969, by Andrea Ovans (May 15, 2014)—HBR Blog Network

2 <http://enr.construction.com/features/bizLabor/archives/050801a-1.asp>

3 <http://cofpaes.org/History.php>

4 http://www.asce.org/Publications/ASCE-News/2007/03_March/A-Question-of-Ethics

<http://www.nspe.org/resources/ethics/code-ethics/history-code-ethics-engineers>

5 <http://www.aia.org/advocacy/federal/AIAS078521>

6 http://cenews.com/article/8285/fazlur_rahman_khan_ph.d._1929_1982

7 http://en.wikipedia.org/wiki/List_of_tallest_buildings_in_the_United_States

Major credit goes to Nancy Egan and Robert W. Nilsson for their article, "Marketing in the New Millennium: Mapping the Evolution of the Marketing Model"—SMPS Marketer August 1998—<http://nextmoon.com/smps-1998>.