

# When is the Best Time to Conduct Business Development Training?

Contributed by Rich Friedman

April 2012

*The AIA collects and disseminates Best Practices as a service to AIA members without endorsement or recommendation. Appropriate use of the information provided is the responsibility of the reader.*

## SUMMARY

Many firms have mastered the art of providing training (be it business development (BD) training or something else) during busy times by conducting sessions that overlap the workday and after-work hours. Regardless of when you conduct the training, it's imperative that your firm make every effort to maximize your returns from this investment.

### When is the Best Time to Conduct Business Development Training?

There is an interesting paradox in the A/E/C and environmental consulting industries when it comes to business development (BD) training: there never seems to be a good time to conduct it. When times are good and firms are flush with work, PMs and others may not take time out of their schedule. However, when the inevitable slowdown occurs, firm leadership is hesitant to commit funds for this overhead expense.

Recently, softness in their target markets has prompted Principals, PMs, and others to call and meet with past clients and prospective clients to drum up new work. On the way to sales calls, many people realize that they possess neither the skills nor the comfort level to promote new work. Even in the case of Principals and Partners, one cannot assume that these senior professionals and leaders of their firm understand how to conduct themselves and are facile in strategies used to gather market and client intelligence. Why? Because many firms still don't include BD acumen or demonstrated success as a prerequisite for advancement to Principal/Partner.

Business development training can be provided on an ongoing basis—in good times and bad—to satisfy both the needs of lead generation for your firm and the professional development of your staff. Although it's more difficult to make happen, the best time to provide training is when the firm is flush with billable projects and has a strong revenue stream to help fund this initiative. Enhancing your staff's BD skills and ramping up proactive BD efforts when times are good plants the necessary seeds that will bear fruit in economic droughts.

## Keys to Planning a Successful BD Training Session

Here are seven keys to planning a successful BD training program:

1. **Avoid “one-offs.”** Any BD training is best part of a broader undertaking to establish a firm-wide BD culture and accompanying role delineation, articulating expectations, developing metrics, and rewarding folks just like you would with a profitable project. If not, you run the risk of folks saying, “Oh, that was a good workshop,” but coming back to their inboxes and getting distracted. For many A/E/C industry firms, this entails a significant cultural shift.
2. **Keep class sizes small (15 or fewer participants) to control the learning dynamic.** Classes that are too large allow less dominant personalities to blend into the woodwork and make breakout exercises too cumbersome.
3. **Mix up disciplines, offices, and staff experience levels.** The thought of co-mingling your “BD 101” workshop participants with those qualified to attend “BD 201” can cause frustration. But when handled appropriately, there's no better learning dynamic to facilitate mentoring, sharing of best practices, and information exchange (not to mention less tangible benefits such as enhancing esprit de corps).
4. **Hold the session offsite away from work distractions.** As enticing as it may be to use an onsite conference room to save some bucks, resist the urge! What you save in money will be lost in the inevitable trips back to the desk or in extended conversations with work colleagues during breaks.
5. **Establish and communicate session ground rules in advance.** This means all cell phones, PDAs, and laptops turned off. Telling participants the rules in advance enables them to better manage the expectations of clients and work colleagues. (Providing morning, afternoon, and lunch breaks during which folks can catch up on e-mails and voice mails is a good approach.)

6. **Employ active learning techniques.** Liberally sprinkle in individual and group breakout exercises meant to reinforce key workshop concepts. Examples include:
  - Brainstorming benefits (vs. features) clients gain by hiring your firm
  - Practicing your “elevator speech” in front of workshop participants
  - Building the skill of asking open-ended questions to gather market intelligence and assess client needs
  - Exercises that simulate BD phone calls and meetings.
7. **Establish a footprint for accountability before leaving the session.** As you’ve no doubt heard many times, “That which doesn’t get measured doesn’t get done.” Since the desired outcome of any training session is to change behavior, at the end of the workshop, have each participant develop five individual BD goals that are specific, quantifiable, and measurable. For example, a PM may seek to accompany three different Principals on BD meetings, while a Principal may seek to submit three workshop abstracts in the coming year. After the session, each workshop participant meeting with his/her manager to review, discuss, and, if necessary, modify these goals furthers the spirit of being successful. These goals can be added to other goals developed during the employee’s review process.

**BD Workshop Topics**

BD training workshops might include some of the following:

- Using the project delivery process to expand relationships and gather vital client information
- Strategies for strengthening relationships with clients
- Networking
- Turning a cold call into a “tepid” call: the value of market research and specific technology tools in the BD process
- Maximizing return-on-investment from conferences and trade shows
- Why BD requires talking less, asking more, and listening
- Time management (given that most business developers also have a utilization target)
- Which strategies and tactics yield the highest ROI
- Appropriate metrics to track.

**ABOUT OUR CONTRIBUTOR**

Rich Friedman, President of Friedman & Partners, has extensive experience in strategic market planning, market research and analysis, PR and positioning strategy, and business development consulting and training for technical and marketing professionals. He has also assisted firms with implementation of growth strategies, including merger/acquisition searches for target firms and executive searches for key talent.

**RESOURCES**

**More Best Practices**

The following AIA Best Practices provide additional information related to this topic:

- 05.01.11 Maximizing Your Marketing & Business Development ROI
- 05.01.03 Measuring Your Marketing ROI
- 05.01.08 Marketing That Sets Your Firm Apart
- 05.01.05 Commonsense Marketing

**For More Information on This Topic**

See “Building Client Relationships,” by Karen O. Courtney, AIA, *The Architect’s Handbook of Professional Practice*, 14th edition, Chapter 6, page 232. The *Handbook*, which can be ordered from the AIA Bookstore by calling 800-242-3837 (option 4) or by email at [bookstore@aia.org](mailto:bookstore@aia.org).



**Feedback**

The AIA welcomes member feedback on Best Practice articles. To provide feedback on this article, please contact [bestpractices@aia.org](mailto:bestpractices@aia.org).

**Keywords**

- Practice
- Business planning
- Business development
- Practice management
- Leadership
- Best practices
- The Architect’s Handbook of Professional Practice