

Marketing Intelligence: Know Your Clients

Contributed by Frank A. Stasiowski, FAIA

Excerpted from *Architect's Essentials of Winning Proposals*

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SUMMARY

Maintaining personal relationships with clients is an important part of developing a successful firm. To maintain strong client relationships, Stasiowski recommends using a contact management system or a personal digital assistant to keep track of key pieces of information that can help strengthen a client relationship.

SAVE EVERYTHING FOR FUTURE REFERENCE

The key to successful marketing is maintaining personal relationships with your clients. While it is not possible to spend a great deal of time with every client or prospective client, knowing and being able to recall significant personal information about a client can help strengthen a relationship. The opposite is also true: if you forget or are unable to recall a client's marital status, the name of the client's spouse, or the number, names and approximate ages of the client's children (particularly if you have discussed them more than once), the impact on the relationship could be negative.

But even small-firm owners soon develop business relationships with hundreds of individuals, and remembering personal information about each can soon become overwhelming. Fortunately, it is relatively easy to collect and store this information systematically in most desktop contact management software applications, and to have the information available to you at all times in a personal digital assistant.

What should you know about your clients? Ideally, everything. At a minimum, however, you should retain and be able to recall anything the client has shared with you, such as the following:

Full contact information. Proper name and nickname, title, business address, telephone numbers and extensions, fax number, and e-mail address.

Career. Technical discipline, positions held in the firm, length of service with the firm (month and year

of initial employment), prior employment history, current responsibilities, level of responsibility and authority, approximate salary level, significant career accomplishments.

Educational history. Degrees earned, names of institutions where acquired, professional certifications and licenses held.

Associates. Names of supervisor and subordinates, names of and relationships to important colleagues, peers, associates, and friends; whether the individual has personal or professional relationships with owners or employees of firms with whom you compete.

Personality. Strengths and weaknesses, risk tolerance, work habits, goals and ambitions, ethics, quality expectations, entertainment preferences, dress standards, how he or she is viewed by colleagues, employees, or professional peers.

Prior relationship. Your past experiences with the individual, his or her role in the project(s), expectations of you or your firm.

Personal. Marital status; name and occupation of spouse; names and ages of children; home address and telephone number; political and religious affiliations; memberships in social, civic, and community organizations; recreational activities; type of car; pets; military service; whether he or she can accept gifts and under what conditions; sensitive issues not to be discussed.

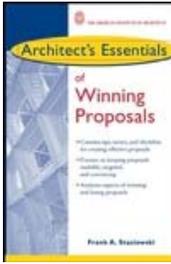
RESOURCES

More Best Practices

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

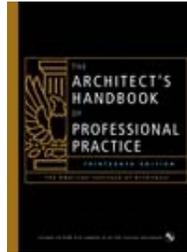
- 05.01.03 Measuring Your Marketing ROI
- 05.01.05 Commonsense Marketing
- 05.02.07 Make the Most of Your Marketing Materials

For More Information on This Topic



This article is excerpted and adapted from *Architect's Essentials of Winning Proposals*, by Frank A. Stasiowski, FAIA.

See also "Seeking the Project," by Howard J. Wolff, *The Architect's Handbook of Professional Practice*, 13th edition, Chapter 7, page 155.



See also the 14th edition of the *Handbook*, which can be ordered from the AIA Bookstore by calling 800-242-3837 (option 4) or by email at bookstore@aia.org.



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Keywords

- Practice
- Marketing