AIA Best Practices:
Seven keys to successful business development training

Contributed by Rich Friedman

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.

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 people 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 comingling 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 espirit 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 emails and voicemails 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 [product manager? project manager?] 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 (ROI) 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 the 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.

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This article corresponds to:

Architect's Handbook of Professional Practice, 15th edition Unit 1 – The Profession
Chapter 06 – Marketing and Business Development
Section 04 – Networking and Business Development