

Engineering Marketing Strategies, Part III

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Congratulations!!

Welcome to *Engineering Marketing Strategies, Part III*, your do-it-yourself guide to creating a Marketing Plan that works for your engineering firm.

Once you've been through this guide, you'll know precisely what it takes to write an effective Engineering Marketing Plan and supporting documentation. More importantly, you'll have a sample of a powerful Marketing Plan to get you started.

This is the next step in your business story. From this point on, you won't have to stab in the dark – you'll have clear direction. You'll start to see some real results for your efforts.

Once completing the on-line course at our web-site www.engineeringbusinesspubs.com, you will be awarded with 3 PDH. The on-line seminar includes reading this guide and passing the 15 question test on our web-site.

Currently 30 U.S States require licensed engineers to obtain continuing education credits (CEU) or professional development hours (PDH) in order to renew their license. The PDH awarded by our seminar will be accepted by your state licensing board. **I personally guarantee it.** If your state board rejects our on-line seminar PDH, please forward us a copy of the board's letter and we will refund to you the cost of the on-line seminar.

How to Use this Guide

Each step covers an important aspect of your Marketing Plan – these are things that you must give special consideration to before implementing your Marketing Plan.

You will be surprised how much this guide will reveal about your business marketing efforts. It will get you to think about important issues that may have never crossed your mind in the past. It may also uncover new issues. But it is never a better time to put together or update your Engineering Marketing Plan than now.

While reading please go ahead and jot down some notes in the spaces provided. It will help to improve your Engineering Marketing Plan.

Later sections will go into greater depth describing how to develop a Unique Selling Proposition, and Engineering Attire.

Now, it's time to get started.

Phases of Marketing

Every marketing book you may have read or seminar attended will summarize the marketing plan as consisting of several phases. Your business is people and in order to have business between people they have to establish trust first. And that trust is developed through personal relationships. Your clients will only do business with someone they know and like. Marketing can be summarized into four phases; Creating Leads, Follow-Up, Making Presentations, and Closing. Marketing strategies apply to each of these phases as described below.

PHASE 1 – CREATING LEADS

“Creating Leads” is also known as “Prospects Generation” or “Filling the Pipeline”. During this phase marketing efforts and activities are geared towards finding people who might be interested in your product or services. They are not necessarily clients or someone you already know, but someone new. For years you may have been told by engineers that they don’t need to find new clients, because their existing clients are feeding them all the work they can handle. If you have built your business to such a point that there is no need to make marketing calls that’s great. But when the economy starts to slow or drops off, your existing clients may not be able to feed you any additional work. Then you are forced to fill your pipeline with new leads.

Engineers can categorize your client’s markets into two sectors; Public and Private. The Public Sectors are the Utility Companies, and City, County, State, and Federal Governments and Agencies. The Private Sectors are Home Owners, General Contractors, Developers, Investors, Architects, and other Engineers. Knowing the needs of these markets is absolutely important in developing the marketing plan.

Most of the marketing strategies for a business that sells a product do not apply to a service oriented business. Yet most of the literature in magazines and books describe marketing strategies that have very little to do with the consulting business. You can make and deliver all of the door hangers you want and you will not receive any leads. The main way to generate leads for the engineer is word of mouth. Initially the best way to get the word out there is to make your firm as visible as possible, and to be accepted as the experts in field. If your potential client has an engineering need, you want him to think of you. There are a number of ways to generate leads for a professional engineering company.

Engineers are often very apprehensive when it comes to speaking to others in a public sitting, especially, someone who is not among the engineer’s peers. But this is your livelihood. See if this ever happened to you? A group of individuals from New York are

in Las Vegas looking for investors in their new construction product. Things are not going very well so they decided to stop off at a coffee shop to take a break. While in line one of the men struck up a conversation with a stranger. The stranger, a well dressed man had just left a meeting with his construction company. Now by looking at the way this man is dressed you would never guess that he owns a construction company. During the conversation they both found out that they had a common friend in California. This common friend was an investor in both the construction company and the New York men's new construction product. The Construction man became instantly interested in the product and wanted to have a meeting later to discuss how he could also invest in the product. This is a true story.

The point of the story is that these people would have never met if they did not struck up a conversation at that coffee shop, and what is even more truly amazing is that someone from New York knows someone in Los Angeles and that person knew this man in Las Vegas. The two strangers that never meet before just developed a business relationship by a simple conversation.

You should always talk about your business with anyone you meet. You should talk with the parents at the cub scout meeting, the adults at your sons baseball game, and while playing bingo at a church gathering. While you are waiting on the bell at your daughter's school talk with the parents. Make sure you are carrying business cards all of the time. You just never know who you might meet.

After talking with people in person the next best method is direct contact with the individual you are trying to market. Sending out a mass mailing or calling will have very little effect for an engineering company. This is known as cold calls, because you don't know who you are contacting and they don't know you.

Filling the pipeline is best accomplished by calling old clients you have not heard from for a while to request referrals. The other reason for making direct calls is to pre-qualify prospects before the meeting. You want to make sure that they are the right person to listen to your presentation and that they are financially capable of hiring your firm.

Of course when trying to find new leads you will have to build contact lists. There are several techniques to do this. Here are some sources:

- Internet search. Every practicing architect has a state license and that licensed individual can be found on the state's board of licensed architects. The same is for engineers. You can also search the business license for developers, contractors, architects, and engineers. The web information can show who the principles are, phone numbers, and address. Then you can cross reference that with the professional license.

- Online Yellow Pages. Also list various businesses by category. Again you can look up the professions of developers, architects, engineers, and contractors. The only problem with this list is the information can be out of date.
- Trade Directories. These directories are found with such organizations as the Chamber of Commerce, American Society of Civil Engineers (ASCE), and American Institute of Architects (AIA). This may require you to become a member of the various organizations before they will release their directories.
- Associations membership rosters
- Rental of mailing lists. Mailing lists can be leased that provides the mailing address, email address, key personnel, and other specific information. These lists can have additional constraints to just residential developers or commercial developers, or even to specific geographical areas. The rental fee is usually based on 1000 name increments. You can not reuse the list without paying a fee, but those individuals who respond to your mailers are yours.

The best method to contact a number of people in a short period of time is by mailers or e-mails, but again note people prefer in-person contact or phone calls. Mailings and e-mails allows the contact to just throw the mail away or delete the e-mail and you want necessarily know. If you chose to use this method send articles of interest, event announcements or links to a useful web-site. Be informative. Your purpose is to remind them of you.

Another approach to gaining more people in the pipeline is to attend events and social gatherings. Any event that your prospective clients would attend like mixers, conferences, luncheons, fund raisers, lectures, workshops, awards ceremonies, professional associations, private gatherings for meeting new people, and lead exchange groups where leads and referrals are swapped.

Don't let your pipeline dwindle or shrink to nothing. In tough times you have to increase your efforts to keep prospects in the pipeline. Spend more time on the phone, networking whatever it takes to find people interested in your services. During a decline in the market, all of your marketing efforts must increase. Not doing so will spell absolute disaster for your company.

Inevitably you will be asked by your clients for referrals of other professionals and contractors that can assist them in accomplishing something. At this point you will need to turn to your referral list. Due to your company's agreements with other company's whether informal or formal, the company needs to make sure that the staff references only the company's approved referral list. This marketing method is usually known as referral partners, which means that they also refer business to you. If your firm is not referring clients to them, they will reciprocate by not referring clients to you.

In the civil engineering profession engineers deal with a large number of individuals from the beginning to the end of the development. The more linked you are to the local

community the more likely work will be referred to you. Just think of all of the individuals they can refer clients to:

Entitlements:

Architects
Residential Designers
Residential Realtors
Commercial Realtors
Residential Appraiser
Commercial Appraiser
Commercial Loan Brokers
Investors
Commercial Property Managers
Land Planners
Attorneys Specializing in Land Development

Design Phase:

Architects
Surveyors
Geotechnical Engineers
Structural Engineers
Mechanical Engineers
Electrical Engineers
Plumbing Engineers
General Contractors

Construction:

General Contractors:
Graders
Specialized Contractors
Construction Management Contractors

And the list can go on and on. If the client trusts you, he will believe that you will refer people and companies that are like minded, and provide a good service.

Now, let's take a look at specific strategies for generating leads.

- *Description of company services.* A clear, concise description of all of the services your firm provides. Be sure to include the features, benefits, structure, and cost of the service. This description can be used as the basis of numerous marketing material including brochures and websites
- *Niche Market Description.* Define your company's ideal client. Is your client in the private or public sector? Are they a large experienced developer or a novice small developer? Are they municipal or state government? Defining your niche will focus your market campaign on these specific targeted clients.

- *Business Cards.* Your smallest but most used business publication is your business cards. Your business cards represent your company 24 hours a day. An engineering business card that is professionally produced states your business is professionally ran. A card printed on your office printer also makes a statement that is not always very flattering for an engineering firm.
- *Website.* Most engineering websites are the company's online brochure, describing the services the company provides and projects the company has completed. To act as a lead generator the site needs to do more. The site needs to be filled with resources that are up to date with the latest information that your targeted client will find as useful. Because of the resources, other sites will want to link with your site. These activities will raise the ranking of the website on search engines, and getting more targeted client to view your site. Increase your website visibility by making improvements to get higher placement on search engines, keyword rich content, activity on social network platforms, and writing articles for publication on other websites and magazines. Whether your website is about your company or is content rich site about some part of engineering make sure you have a way for prospective clients to contact you. Have a newsletter opt-in or a sign-in sheet on the site. They will be more willing to give you their information if you offer something for free. The goal is to obtain leads.
- *10-Second Introduction.* This is a simple introduction of company by stating who you are and what you do in a memorable way. If you are a civil engineering company in land development, you might say something like "Hi I'm Joe Smith and I design environmental friendly communities. My company is ACME Engineering, and we provide civil engineering and surveying services."
- *Prospect List.* This is a list of targeted clients that you want to do business with. You could lease a list from a company, or you could do the research and create this list on your own. If your target is developers in the local area, then it would be quite easy to create this list. First go to your chamber of commerce and find all of the contact information for developers. Next research the local business license at your city or county website. Review the phone book. Ask your network of friends who they know. Before long you will have a long list of prospects. There are numerous sources for information. Check with local associations, events, conventions, conferences, publications, and websites are some of the sources.
- *Publication Opportunities.* Like speaking opportunities, authors are seen as experts in their field or practice. There are many types of publications. The basic are articles which can be published in newspapers, newsletters, trade magazines, websites, and a host of other publications. Of course other publications include writing Pamphlets, Guides, Manuals, and Books on specific engineering topics.
 - *Writing Articles* – Articles are about 400 words long. An article about something you work with every day should not take very long to write while a subject you may know less about will take longer to write because you will need to do some research. The idea is to get your name and the company name into the publications that your clients read. An author has instant credibility. The cost for having articles published is practically nothing.

- *Writing Newsletters* – Many marketing experts will say that any business can and should use newsletters as part of the marketing program. The problem with most newsletters is that they are nothing more than sells letters, and usually end up being thrown into the trash. Newsletters that are saved and even used as references are filled with useful content that is pertinent to your clients. If your business caters to the land development industries, then your newsletter should be filled with articles that are useful to engineers, contractors, architects, investors, developers, financial brokers, real estate brokers, and so on. Newsletters should be about 4 to 5 pages long. Word of mouth can quickly spread about your services once people start seeing your newsletters in the waiting room magazine rack or the side tables with the trade publications. Marketing with newsletters can be expensive if using the post office. Newsletters sent via email are very inexpensive, but only send emails to those individuals using the opt-in sign-up sheet on your website.
- *Newspaper Expert* – Send a personal biography to the local newspaper, and copies of articles and other publications references. Let them know your area of expertise, and that when they writing articles in your area of expertise to please contact you. Being quoted in a news article is an easy and free way to market.
- *Speaking Opportunities*. Find an opportunity to speak in front of an audience. Speakers have instant credibility and are seen as expert in their field. There are many venues for speaking. Some of the more common places are groups, association meetings, conferences, and conventions. Even speaking regularly at the public meeting representing projects is an opportunity to promote your business. Most public speaking especially in local venues are for free. Turn these speaking opportunities into marketing opportunities. In the speaker introduction have them say the name of your company, and at the end of your speech and in your hand-outs make sure to let everyone know how to contact you.
- *Publicity*. You can also offer your opinions to be quoted in publications and media programs to the editors and reporters of newspapers, magazines, radio talk shows, and news programs. The same individuals also may want to interview or profile you on their programs.
- *News (Press) Release*. News Releases (Press Releases) are briefs on news worthy events submitted to the media. The media often uses this News Release as fillers in their publications. News worthy articles can be anything from the company being awarded a very large project, news services, new equipment, office expansion, a notable staff addition, completion of unique projects. If they decide to publish the News Release, the editors may also want pictures, bios and additional information.
- *Social Networking* – The age of Flickr, Facebook, Twitter, LinkedIn, Blogs, and a multitude of other social networks has arrived. Use these platforms to establish yourself as an engineering expert.
- *Direct Mail* – Develop a contact list and a budget to send out mailers reminding your prospects that you are still in business, the services you have to offer, articles you have written, press releases, and son on. Stay in contact. When they need an engineer they will make contact.

- *Conventions* – Pick the right conventions. Not all conventions will have your prospective clients. If your company specializes in municipal waterworks then a Landscape Architect's convention is probably not well suit for your firm. While at the convention mingle with the crowd. Pass out your business cards. Get their business cards. Lease a Vendor Booth, and meet even more individuals. The goal of the convention is to gather leads; fill the pipeline.
- *Trade Shows* – There are two ways to attend trade shows as an attendee or speaker, or as a vendor. Some trade shows are free to attend, but most will cost money to register. The main mission at the show is to obtain leads. So pass out your cards and advertisements, but also obtain names and contact information.
- *Consumer Shows* – Attend Home Owner Shows or consumer shows and listen to what every one is saying. If someone wants a room addition or wants to build an ancillary building on their building, they will need an engineer. Be ready to give them your business cards or to give them referrals. If you have the funds available, lease a booth at the show and pass out pamphlet to everyone that comes to you.
- *Meetings* – Attending meetings is another way of obtain leads. Everyone watches everyone in a meeting measuring their knowledge, experience, presentation skills, social skills, and more. Your future maybe someone in the meeting or someone they know. Make to bring plenty of business cards to a meeting, and pass one out to everyone in the meeting. First impressions are lasting.
- *Promotions*. You may want to put on a free workshop or demonstration on a specific topic that your targeted clients would be interested in attending. When hosting workshops or demonstrations make sure you have enough room for your audience. This can be ensured by requiring reservations. You can also sit-up an exhibit at a local trade show. Trade shows can be expensive. Make that the trade show you decide to exhibit is specifically for your targeted clients.
- *Advertisements*. Perhaps one the most expensive type of marketing for an engineering company is placing advertisements. If done probably and placed in the right publications or media can produce a very successful campaign. If your firm plans on placing advertisement in publications or a website, make sure the publication or website is specific produced for your targeted client.

PHASE 2 – FOLLOW-UP

Once receiving a prospective lead you want to follow-up. Follow-up is a process of reminding your leads of you, and to see if they are in the market for an engineer with your skills or if they know of someone else who maybe in need of your services. Most leads are probably not quite ready for you, but want to stay in contact with you.

Let's say you just attended a networking function and now you have a stack of business cards (Leads). It is now time to contact these individuals within a few days after the event while your initial greeting is still fresh on their mind (Follow-up). Every article about follow-up states the same thing that this is were most sells are lost, because

many people for one reason or another just don't take this step. Something as easy as picking-up the phone and placing a call is often left undone. Granted it may take several follow-up contacts before you can move onto the next phase.

There are several strategies to follow-up on leads.

- *Contact Management System* – This system is really a database listing all of the leads an individual or a group of individuals in the firm has received. The database keeps the lead generation organized, and it keeps track of who is performing the follow-up calls, mailings, and meetings. The database will also store key information about the lead, like the birthday, spouses name, anniversaries, likes and dislikes, and much more. There is software that is specifically designed for this task, which can save a lot of time compared to tracking the contacts by hand.
- *Marketing Kit* – Some firms will actually prepare different brochures and letters for the specific lead varying the information depending on the lead's needs. The marketing kit is generally a folder with side pockets and slots for business cards. Placed inside the pockets is a cover letter stating were you meet the lead and what was discussed. The kit may also include engineer's bio, your business cards, pamphlets on services they would be interested in, newsletters and articles that your firm has published, recent News Releases, related Project Sheets to demonstrate your expertise, and maybe Testimonials from satisfied clients. The package is designed to draw their interest and desire to make further contact with you. Marketing packages can be expensive to print and mail to every lead. You might chose to send these packages only to pre-qualified leads. Leads that are in need right now for engineering services that your firm provides.
- *30-second Advertisement* – This is a statement about a paragraph long that tells a lead what your firm does, how you might be able to assist them, and why they should talk to you. This scripted introduction can be used in a number of ways. The introduction can be used as an opener for presentations. It is also useful when you are attending a meeting and they ask everyone to introduce themselves. Be prepared to use the advertisement when you make a follow-up call and get an answering machine, leave the message and let them know you will try to contact them later.
- *Meetings* – Meetings can be held in many places like coffee shops, restaurants, golf course club house, and so on. They don't have to be held in someone's office. A relax atmosphere is much better at this stage of marketing. You are only trying to establish a relationship. But meetings of this kind can be expensive, especially if your company's budget is not very big. Some businesses may have the adage to never eat lunch along. Always invite someone to meet you for lunch. Of course, if you are inviting, the etiquette is that you are buying. Everyone loves a free lunch. Also remember that your prospective client may not be in the market right now for an engineer, but is looking to sit-up a relationship with a new engineer for their future projects. In order to build a relationship with the client you will need to meet them from to time. Inevitably these relationship building meetings will lead to a discussion

about what services you have to offer. Eventually, they will be ready to get started on their project and they will call you to make a formal presentation at a company meeting.

- *Mailings* – It's fairly easy to put together a marketing package that can be sent to a lead. The package can be as simple and inexpensive as a post card. The postcard should be very simple showing your company name, web address, your name and email address, and possibly a Unique Selling Proposition. The idea is to simply remind them of you, and having them wanting to contact you or least awaiting you to contact them. If you want to go all out, you could send an envelope filled with brochures, newsletters and other publications. But why? Do you know what the client needs at this point? Most likely not. A simple post card in most cases is the best way to make the initial lead follow-up. Also note that you can not do follow-up meetings every week with your prospective client nor do they expect you to do this. During these inactive periods you should send them a mailer either by mail or email with a topic of interest to them. Typical mailers are brochures on new products, new techniques, or even new services your firm is now providing. Other good mailers are News Releases, your published articles, links to websites, and inventions to upcoming events.
- *The Internet* – A part of the process of obtaining leads is to get their email address. Most everyone prints their email address on their business cards. Make use of this by sending them a message a day or two after meeting with them. Remind them of your discussions, and attach a brochure and/or attach a link to your company's website. You might ask them when would be a good time to connect them via a phone call or possibly a meeting or a lunch. Your goal is to begin a relationship that might eventually lead to a proposal.
- *Building a Personal Relationship* – Most leads are just not ready for your services. They may have done a project before that required an engineer, but they are contemplating a project now that will require your services. They maybe in the middle of project and already have the necessary consultants on board. They maybe in between projects and are just gather references, but are not ready yet to start the project. The best approach is to build a relationship with them by building your credibility with them.
- *Contact Lists*. One of your most important marketing following-up tools is your contact list. In today's world most lists are kept in a database either on the computer or on the internet. These electronic files can then be used to create mailers, reminders, and other marketing material.
- *Calling and Mailing List*. The most effective method is to call – mail (email) – call. A single call will not in most cases lead to anything. You may have to call at a better time. In the mean time you want to send a mailer or an email to introduce yourself. Then they will be more interested in your follow-up call. If during your phone call they express interest in your services, then is the time to send that marketing kit. If you get an answering machine leave your 30-second commercial.
- *Newsletter or E-zines*. An alternative to mailings are newsletters or e-zines. The typical newsletter is 2 to 4 printed pages, while an e-zine is the same thing except in electronic

format and are usually attached to emails. There are several good software and websites that can assist you in publishing a quality newsletter or e-zine. Make sure that when you create a newsletter it is full of content that is useful information that the client will want to keep as a resource. You'll know you have done a good job when you see filled with your newsletters in a client's office.

- *Personal Connections.* Of course the best people to follow-up with are the people you already know. They will be willing to talk to you and even help find new leads. They may even introduce you to their contacts. In sells they call this your hot and warm list. The further removed they are from you the colder they get. That's why they call it cold calling when you are calling someone you don't know. The better you know an individual the more likely they are to do business with you or help you find better leads. If your list of personal contacts has been exhausted then you need to get out there and get involved and form new relationships.

PHASE 3 – MAKING PRESENTATIONS

For the engineering profession making presentations depends on the audience. Not all presentations are for sells. In fact, most presentations are nothing more then letting your prospective clients know your expertise; what area of engineering your firm specializes. These types of presentations are actually part of Lead Generation. Making presentations in Phase 3 are when a potential client, prospect, is interested in your services, and wants to know if you can fill their needs. There are several approaches to making Presentations, but all are geared to the final phrase which is the "Closing."

The next part of the Marketing Plan is how the firm performs company presentations to prospective clients. The presentation is made to listen to what are the client needs, and describe what your company can provide and how your company can fulfill the client's needs. The object of the presentation is to talk about the client not you. Let them tell you what they need; don't start your conversation with what your can do for them. They just might not need your services. In order to make your Presentations stand out from the competition, the Marketing Plan should address one or more of the following strategies:

- *Prospect Qualifying.* The objective is making a presentation to the decision-maker that has a project and a budget for your services. This is done by asking qualifying questions. Start your conversation by asking open-ended questions that requires the prospective client to answer with more then a yes or no. Ask questions like do they have a problem that your services can resolve. Does the prospective client need your services? Are they the decision-maker, or is there someone else you should talk with? Are they ready to start on the project, or are they still a ways off? Can they pay your fees? Who else is proposing on the project? All of these questions pre-qualify the lead to determine if they are in the market for your services, if they have a budget in mind, and if they have a timeline. All of these questions can also be placed on your website's contact form.

- *Rehearse the Presentation.* A well thought out presentation that has been rehearsed several times will stand out. Concentrating on the power point presentation, and sample materials and not on the actual talking points may be a major mistake. Practicing the presentation with the props is necessary to get familiar with the material, and to time the speech. It is also recommended to record a video of your practices to notice your mannerisms and the impact of the props. Practices increase your confidence and minimize your nerves, which make for a much more professional presentation and increasing your chances with the client.
- *Make Your Web-site Stickier.* Visitors to your web-site may stay for a while or return several times until ultimate they make contact with you. Search the internet and you will find a number of ways to make visitors stay longer. They want to see a website that is loaded with information that they can use. Adding new information on a regular basis encourages them to return. Fill the site with articles, case studies, a message board, calendar, blogs, tools, resources, and freebies. There are basically three techniques to make website sticker.
 - Freebies - Not only have your company information on the website, but also add a lot of content-rich information; useful information that the client can use. They will return to the website just to learn more about how to process plans through the County quicker.
 - Content - Offer free material such as a newsletter, an e-book, or booklet, if they leave their email address. An autoresponder can then forward the free material to their emails. The nice thing about autoresponders is that they can be sit-up to send multiple messages to an email address. Each message can be scheduled to be sent 1 day later, every week or month thereafter.
 - Interaction - Another method is add interactive tools to the web-site like construction bond estimate calculators, government review agency calendars, or even the ever increasing popular blog comments.
- *Increasing your Visibility.* Clients tend to want to have a well known expert on their team. It's a much easier phone call if they recognize your name. You have instant credibility, and they look forward to talking with you. If you are making new contacts and they are not aware of your engineering firm or you, you need to increase your visibility. Several strategies have already been discussed that will increase your visibility. You can become active in organizations, join committees, write articles, make presentations, provide free workshops and demonstrations, and submit press releases. Requesting to make a presentation to someone who already knows you, is far easier then someone who is unknown.
- *Researching the Competition.* Usually the engineering competition in any community is easy to identify. Even the services provided by the engineering firms are similar. What is different is how those services are provided and who provides them. You need to know what your clients like about competitors and what they don't like about

them. Knowing your competition is essential to developing your competitive advantage.

- *Researching the Targeted Market.* Understanding what your targeted client wants and needs are will assist you in your marketing kit. The easiest way to determine this information is simply to research your existing clients. Ask them the questions, and they will definitely give you the answers.
- *Improving Market Position.* Companies considered to be in the top tier of the profession will garner more work than those at the other end. You and prospective clients may have a completely different opinion on your company's ranking. The important data is how they think of you, and this is only determined by asking questions. How does your company compare to the competition? Do you provide better services? Are you cheaper or more expensive? Are you an expert in the field of engineering? If the answers to these questions place you low in the category, then it's time to improve those impressions. This can be accomplished by doing the same activities as was discussed for increasing visibility.
- *Defining Company Services.* Most engineering firms can provide numerous services, but in order to get to do a presentation the prospective client is only interested in a few services. They don't necessarily want to know about all of the other services. Discuss the services that will meet their needs and wants.

PHASE 4 – CLOSING

Yes, the ultimate marketing goal is to turn the prospect into a client, and then maintaining your relationship with your existing clients. The time from generating leads to establishing a client can take a few days to months, and sometimes longer. That is why once you have clients you will do whatever it takes to maintain the trust with them. This process begins with the client signing the agreement.

There are many ways to write a proposal, but the best presentation leads to a signed agreement to perform services. To create more opportunities with proposals you must think out of the box. The typical engineering proposal consists of services to be provided and a price for each or all of the services. Proposals are marketing tools that demonstrate the company's expertise and professionalism. The proposal should stand apart from the other proposals the potential client may receive. In short, proposals are an outlined plan to accomplish the client's desired results.

The Operations Plan needs to address how every proposal issued by the company will appear and the order of its contents. The proposal is a structured plan that your company has compiled to solve the client's needs. Depending on the client and the size of the proposal, the proposal presentation can be as elaborate as a power point presentation with key team members discussing different parts of the plan, or it can be as simple as sitting at a dining room table and discussing the specific tasks with the client. The proposal should be well structured and follow the basic outline below:

1. Cover Letter
2. Agreement
3. Assumptions
4. Specific Tasks
5. Compensation Summary
6. Preliminary Plans
7. Project Schedule
8. Company's Completed Related Projects
9. Testimonials

This outline can be shortened to a few pages for fairly a simple project or it can be expanded to more than 30 pages for larger and more intricate projects. Of course the government proposals may follow a different format, but the main points are basically the same. Once the proposal has been discussed with the client and everyone is satisfied with the plan. Direct the client to sign the agreement. The agreement once signed by both parties is a legally binding document. There are several engineering agreements templates available, but it is recommended that a lawyer review the document prior to adding the agreement to your proposal packages. Make sure you clearly understand each line of the agreement. In some instance the client may want you to sign their agreement. In this case make that your lawyer reviews their document, and again you understand every line. If you are having trouble getting clients to sign the agreement, there are several strategies that you can use to increase your success.

Below are some specific marketing strategies that can used in the Closing phase.

- *Closing the Sale.* At the end of the proposal presentation the final step is the closing. You want a signed agreement when you have completed the meeting. The client has spent the time with you over the previous three stages, and knows that you are credible. They know that you are the expert for this type of engineering service. So what is stopping him or her from signing the agreement? The best way to get to the closing is by being prepared to respond to their hesitation. Have a script ready to go for answering any questions they may have. The point is just don't be afraid to ask for their signature.
- *Qualifying Prospects.* If you are presenting to the wrong prospects, you will not receive signed contracts. Pre-qualifying them with questions while you are in the Follow-up or at the latest in the Presentation stages will avoid this situation.
- *Present Your Proposal to the Decision Maker.* When meeting with the lead ask a question about they will be making the decision to sign your proposal or will they assist you in meeting with the individual that has that authority. In some cases especially with very large firms your will make your presentation to a screening community prior to presenting to the decision makers. If you leave it to someone else to represent your proposal, the chances of an approval are greatly diminished.

- *Building Stronger Relationships.* Engineering contracts can be a very expensive bill. Prospective client will be making a major commitment by signing your agreement. Before they do this they want to know that they can trust you. That you will follow through on your commitments, and that you have the resources and skills to complete the contract. One method that overcomes this obstacle to start building a stronger relationship up front in the marketing process. Spend the time to make yourself visible. Be involved with the associations, networking events, conferences and other gatherings that they attend. Send them invitations to events that you will be attending that is of interest to them. Send articles and other publications that would be of interest to them.
- *Increase Your Credibility.* Restate your accomplishments and credentials. In your presentation follow your name with any advanced degrees, licenses or certificates like a Master of Science or Doctorate of Philosophy degrees, Professional Engineer license, and LEED certified. You may want to state in the presentation what boards and committees you are a member like the County International Building Code committee. If you are a published author, your client would definitely want to know. Your client wants to know that they are dealing with a highly accomplished individual that is a recognized expert in the community. This recognition may be just what is needed to win the contract.
- *Improving Presentation Skills.* It is true that most engineers are not very good at public speaking, and making presentations is not always an easy task. The easy way to improve on your presentations is to first make an outline, and then script out the important points. Finally, rehearse the presentation until it feels right. There are associations that you can join that will help you improve your presentations. The most notable is Toastmasters. Remember at the end of your presentation ask for the sell.
- *Improving Selling Skills.* Most engineers will definitely say that they are not salesmen. But in fact in a presentation you are selling your services. The better your sales skills, which are usually overcoming objections, the more likely you will be awarded contracts. It is highly recommended that you read books on selling, attend workshops, and practicing. Be prepared to answer their objections, by making a list of possible objections and your response.
- *Project Folder.* In your presentation show similar projects that your firm has completed. The projects should give the project name, project size, project description, developer, architect, contact names, and any testimonials. Let the prospective see your client list. Show the prospective client that you have the experience and creditability to complete their project.
- *Leave-Behind.* Whether you achieve an awarded contract or not you may want to leave one last thing for them to look over. You leave it as you are leaving the presentation or mail it to them. This may include a sample copy of engineering plans, technical reports, articles, booklets, newsletters, testimonials. It may also include other items that the client will use every day like calendars, pens, picture, coffee cups, and so all with your company logo and USP. Do a search on the internet for marketing products. The idea is to make your name stand out.

- *Improving Professional Credibility.* If the prospective client is not quite sure that you have the ability to complete the project, you just might have a credibility issue. There are a number of ways to improve your credibility. You build your credibility with your client early on by showing your work in the past. Send prospective client articles you written before the presentation. If your credentials are lacking, then you are going to have to take the necessary steps to build up, but it will take some time to develop. Get to work writing publications that we have already mentioned, sending out News Releases, and get quoted. Establish yourself as an expert in the profession.
- *Improving Testimonials File.* Make an effort to obtain testimonials from your clients. These testimonials can be used in all of your marketing material. Place hand-out sheets in your marketing kit, and include in your presentations.
- *Represent Your Own Proposal.* No matter how well intentioned, having a lead company representing your proposal and several other companies' proposals as one team, does not always work. Having one spokesman for the entire team presenting at the meeting without a company representative from each team member shows the client a lack of interest. If your firm is teaming with a group of companies on a project, each company should have a representative make a presentation for their portion of the proposal. It is always better that each team member interact with the client to demonstrate their competence and technical knowledge to handle the client's needs. An assured client is much more ready to approve a proposal.
- *Follow Up.* After making the proposal presentation and the client wants to review the proposal before signing you will want to schedule a follow-up phone call with the client. If they have not signed the agreement as of yet you may want to ask some open-ended questions. Questions like
 - "Is there anything you don't understand or have questions about in the proposal?"
 - "Is the proposal missing anything?"
 - "Is there a specific date as to when the agreement will be signed?"

These types of questions will allow the client to open up and indicate whether they will be using your services or not.

Now, let's apply these strategies to your situation.

What marketing strategies are you currently using in your Market Plan? Describe.

Filling the Pipeline

Following Up

Getting Presentations

Closing Sales

Are there any stages that are weak? What additional strategies are you planning to implement?

Your marketing strategies ideas can now be added to your Marketing Plan

About the Author

Joe Alvin Haun, PE, MSE

Joe Haun is a highly experienced Civil Engineer, author, public speaker, and business advisor who have worked in the engineering profession since 1983.

Mr. Haun's early career was in the United States Air Force as an Engineer Assistant. A Desert Storm veteran he has a unique perspective of the Middle East.

Mr. Haun graduated from the University of Las Vegas, Nevada in 1994 with a BS degree in Civil Engineering and in 1995 with a MSE in Civil and Environmental Engineering.

Mr. Haun worked with several engineering firms in the Las Vegas valley until February 2005 when open his own engineering company HAUNTEC, which has grown to a designing multi-million dollar projects in Nevada and Utah and in the countries of Iraq and Costa Rica. Review his growing company's website at www.haunteceng.com to see the firm's latest capabilities.

Mr. Haun has published articles in engineering magazines and has given speeches on water resources, and is currently working on several articles on permeable pavements.

In 2009, Mr. Haun started Engineering Business Seminars and Publications to. His first publication is the "Engineering Business Success." He has created many self-study engineering business seminars for Professional Development Hours credits. Visit the web-site www.engineeringbusinesspubs.com to review the latest seminars and publications.

Recommended Reading List

Engineers are constantly learning about new techniques, products and design methods. Improving your skills as a business leader is no different. Reading books is one of the best ways to improve your skills. Below is a list of books we recommend.

- *Engineering Business Success* by Joe A Haun (book)
 - *Engineering Business Plan* by Joe A Haun (seminar)
 - *Engineering Marketing Strategies* by Joe A Haun (seminar)
 - *Engineering Operations Strategies* by Joe A Haun (seminar)
 - *Engineering Financial Strategies* by Joe A Haun (seminar)
 - *Engineering Proposal Strategies* by Joe A Haun (seminar)
 - *Engineering Joint Venture Strategies* by Joe A Haun (seminar)
 - *7 Habits of Highly Effective People* by Steven Covey
 - *First Things First* by Steven Covey
 - *Awaken the Giant Within* by Anthony Robbins
 - *Unlimited Power* by Anthony Robbins
 - *The E-Myth Revisited* by Michael E. Gerber
 - *Get Clients Now* by C. J. Hayden
 - *Dress for Success* by John T. Molloy
- ❖ Please visit our web-site www.engineeringbusinesspubs.com to order Joe Haun products from our recommended book list.
- ❖ Our on-line seminars include the manual, down-loadable from the web-site www.engineeringbusinesspubs.com , and sample letters and forms. After completing the seminars the participant will receive a PDH certificate showing the number of units awarded.

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