

THE SHORTLIST

Q3 - 2016 | SMPS SFBAC PUBLICATION

Back to Basics

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Managing Editor	Al Anderson, NOVA Group
Assignment Editors	Erin Clinch, Leddy Maytum Stacy Architects Shannon Daggett, Langan
Designer	Katy Livingood, Dome Construction
Communication Committee Directors	Justin Nagy, Enovity Tina Barni, Degenkolb Engineers

Contact Us at shortlist@smpssf.org



President's Quarterly Update

I'm excited and honored to introduce myself as the new President of our SMPS San Francisco Bay Area Chapter for the 2016-2017 Board year! A special thank you to Katie Spurlock (our amazing immediate Past President), the entire board of talented and professional industry leaders, as well as our outstanding 76 Chapter volunteers for making what we do possible.

Most recently, through serving on the Communications and Outreach & Development Committees, I've met some terrific mentors and friends and learned about what it takes to manage our outstanding extra-large Chapter. It understandably takes a high-level of skill in the six key domains of practice, but, most importantly, it takes a team effort. I continue to be impressed and grateful to volunteer alongside the tremendous team of enthusiastic volunteers and many generous sponsors that keep our Chapter running efficiently and continuing to strive for excellence.

When I joined SMPS back in 2006, I would have thought being President of our Chapter was entirely out of reach for someone like me who was brand new to the A/E/C industry as a marketing coordinator at a small architecture firm. However, over the past 10+ years, as I've become more and more involved with the organization in various capacities, SMPS has truly become the cornerstone of my career.

“...AS I’VE BECOME MORE AND MORE INVOLVED WITH THE ORGANIZATION IN VARIOUS CAPACITIES, SMPS HAS TRULY BECOME THE CORNERSTONE OF MY CAREER.”

Luckily, the first program I participated in after becoming a member was our award-winning Mentoring Pathways series. Daniel Carfora-Hale, one of our highly-regarded Past Presidents, was my chosen mentor. He coached

me on the fundamentals of A/E/C marketing and helped me develop the basic tools I needed to successfully promote marketing initiatives within my firm. Our one-on-one meetings, combined with the regular group seminars with other mentor/protégé pairs, elevated my confidence and skill to a much higher level, all within just a year's time. I am forever appreciative for that opportunity, because without this organization and the tremendous professional network I've cultivated along the way, I would absolutely not be President of the SFBAC today.

My goals for the 2016-2017 board year are to bring our members and prospective members the very best of the SFBAC, to elevate the caliber and perception of SMPS within our industry, and to collaborate with our Pacific Regional sister Chapters to cross-promote. We will continue to improve upon our successes of previous years, while focusing on leadership development and a back-to-basics approach to the fundamentals of our marketing and business development profession through enriched programming and greater networking opportunities. We'll also continue to support the La Casa de las Madres organization for women and children escaping domestic violence as our Charity of the Year.

A few highlights of our strategic initiatives for the year ahead include: bringing back the Founders Awards (for the first time since 2008), hosting a formal holiday luncheon at the Lake Chalet in Oakland, continuing our previously sold-out digital marketing programming, offering an interactive program on the power of branding, and organizing a panel of high-profile public and private sector clients for the spring of 2017.

We have some big plans for this year and a strong Board of Directors to make it all happen. Stay tuned for more information on these and other upcoming educational opportunities and events, such as our annual Mentoring Pathways program, which kicks off again this fall. Be sure to check our online calendar and our weekly emails, and following us on social media, #bestofSFBAC.

I hope you enjoy this issue of *The Shortlist*. Cheers to another great year!



Vanessa Pelletier, CPSM

President SMPS SFBAC

Marketing Manager for FME Architecture + Design

Vanessa.pelletier@fme-arch.com

Back to Basics: Intro to A/E/C

By Erin Clinch

As professional services' marketers, we have all essentially heard the same question from people outside of our industry: "So... what exactly do

"...THE PROPOSAL PROCESS, AS WELL AS THE GENERAL DUTIES OF MARKETERS, CAN VARY ACROSS THE BOARD."

you do?" It's a fair question; many of my marketing peers in the A/E/C industry have confessed that this is a field of marketing we did not know existed until we essentially fell into it (myself included). Part of the mission of SMPS is to promote our industry and the important role of a professional services' marketer, and the most direct way to do this is to outline what we do for those who are not familiar with our line of work, as well

as explain the differences between marketing for architects, engineers, and contractors.

A primary responsibility of a professional services' marketer is to sell our service—that is, preparing proposals as a bid for a potential project. No two proposals are the same; though architecture, engineering, and construction firms work together on delivering a project, the proposal process, as well as the general duties of marketers, can vary across the board.

Architecture

In my just over three years of experience in the A/E/C industry, I have primarily worked for architecture firms. Both firms I have worked for have been on the smaller side. At my previous firm, we had a marketing team of three to support a firm of approximately 50 employees: one Director of Marketing and Business Development and two Marketing Coordinators.

The primary duties of the Marketing Coordinators were to respond to RFPs and RFQs. As an architect, 95 percent of the time we "prime" a proposal—meaning, the prime is responsible for assembling a complete design team consisting of engineers, cost estimators, landscape architects, and any other sub-consultants necessary to successfully complete the project as outlined

in the RFP or RFQ. What this means for marketers: it is our job to help the architects identify the best sub-consultants for the job, reach out to them and communicate what we will need from them in putting together our proposal, and coordinate the marketing materials from as little as three to as many as 15 sub-consultants to work into our proposal. The Marketing Coordinator is also responsible for working with architects to create proposal content.

Additional duties of the Marketing Coordinators are to manage all website and social media content, continually update contact lists and send out email blasts to announce firm news and successes, and organize all promotional and PR initiatives.

The Director of Marketing and Business Development is a more overarching and strategic role. In addition to overseeing the proposal process, the Director's responsibilities include developing the firm brand and ensuring all marketing materials and collateral (proposals, interview presentations, social media posts, etc.) reflect the brand. The Director also encourages and supports firm leadership in maintaining client relationships, as well as participation in industry events, submitting session proposals for conferences, etc.

“A PRIMARY RESPONSIBILITY OF A PROFESSIONAL SERVICES’ MARKETER IS TO SELL OUR SERVICE.”

Engineering

In an attempt to cover the immense world of engineering marketing, I spoke with Wendy Hii, the Communications Manager for Sherwood Design Engineers, a site civil engineering firm of approximately 40 employees. In contrast to most architecture firms, Sherwood is primarily a sub-consultant on proposals and rarely serves as the prime. This typically means that Sherwood is responsible for providing their RFP response to the prime consultant, who will assemble the final document to deliver to the client.

As Communications Manager, Wendy manages all external marketing materials for all of Sherwood's offices, from PowerPoint presentations, collateral materials, website management, photography, and more. She works closely with the CEO and the Director of Marketing and Business Development to define visual and narrative strategy, and work with

their innovation team to extract key narratives and metrics for promotion. Furthermore, she organizes client and social events in the San Francisco office.

The Director at Sherwood leads all business development efforts, working with each of the firm's partners on their business development plans. The Director is also in charge of the marketing budget, helping to establish new relationships, maintaining key clients, setting up meetings for partners, assisting in regional business development strategies, and working closely with the COO and CEO to develop firm-wide marketing and brand strategy. Both the Director and Communications Manager assist on proposal efforts when needed.

Construction

Ali Bedwell, CPSM, is the Marketing Manager for Skyline Construction, a 110-person construction firm in the Bay Area headquartered in San Francisco, with offices in Silicon Valley and remote offices in Oakland, Pleasanton, and Walnut Creek. Ali is part of a three-person marketing team, consisting of a Marketing Coordinator and Senior Coordinator/Digital Specialist in addition to her, the Marketing Manager who oversees all marketing efforts for the entire firm.

“...OUR GOALS ARE ALL THE SAME: TO DELIVER A HIGH-QUALITY AND SUCCESSFUL PROJECT FOR OUR CLIENTS.”

Skyline Construction most often serves as a prime on proposals, similar to architects, and in 2015 sent out 138 proposals to support their staff. Ali tells me that the creation of proposal content typically lies with her and the Senior Coordinator, while the Marketing Coordinator is responsible for general proposal development and execution. The Senior Coordinator offers proposal assistance as necessary, and is also responsible for content marketing, digital channels, graphic

design and branding, and some internal marketing.

As Marketing Manager, Ali reports to Skyline's CEO and is responsible for data/analytic reporting, firm-wide marketing strategy, advertising, PR, branding, new technology, internal marketing, and working with the sales and operations team. Although Ali does not typically work on proposals unless

the pursuit is high strategy or the team is at maximum capacity, she does review and give the final sign-off on all proposals that go through the door. She works closely with the Business Development team, which at Skyline is separate from the marketing team.

Conclusion

As you can see from the experiences of us marketers, every position at every firm counts. There are no unimportant roles—we need the marketing coordinators to do the brunt of the work of creating content and preparing proposals to bid on the project just as much as we need the upper-level marketers to strategize, develop branding, and maintain client relationships. While the specifics of how we market can vary throughout the different firm types and sizes, our goals are all the same: to deliver a high-quality and successful project for our clients.

About the Author:



Erin Clinch serves at the Marketing Coordinator for Leddy Maytum Stacy Architects and has been involved with SMPS since the beginning of her marketing career; she is an Assignment Editor for the Shortlist newsletter. She can be reached at 415-495-1700 ext. 301 or eclinch@lmsarch.com.



Press Releases in the Digital Age

By Shannon Daggett

Press releases were once the bread and butter for marketing and PR professionals. They were the tool we had to attract media attention.

Digital communication has opened the door to other modes of communicating, particularly social media.

You may be wondering if press releases are, well, dead and only useful for company websites for Search Engine Optimization (SEO) purposes. Ellen Blattel, the CEO of Blattel Communications, and Vladimir Bosanac, co-founder and publisher of The Registry, are here to tell you that the press release very much lives on in today's A/E/C industry.

Evolution of the Press Release

What Ellen has seen is the evolution (not the death) of the press release.

"We certainly write fewer press releases, but they have become more targeted and less formal," she said.

Press releases have also become shorter, she said, from the normal two pages to one page—a standard practice echoed by Vladimir. A firm's boilerplate is still at the end of the press release.

“The whole press release format is interesting to me,” Vladimir said, “Some of them are very promotional and not very useful. But, some have the story for you. We adopted this notion that if it’s useful with transactional information and good quotes, we will use it.”

In fact, a real estate leader recently approached Vladimir at an event to compliment him on an article that his publication ran. It was a press release with an editorial note up top stating that it is submitted content.

“I don’t think people care,” he said, regarding the authorship, “They are clicking on (the article) because it’s relevant.”

Unlike other subject matter, press releases on real estate news can often provide the same information as a news story written by a reporter. So, when we write press releases, we should keep this in mind.

“We encourage companies to (submit press releases) because quite honestly you’re on the forefront of what’s coming down the pipeline,” Vladimir said.

Of course, it has to be interesting and informative.

When talking about press releases, Ellen often stresses the importance of strategizing. Asked what word she would have said 20 years ago, she responds with “visibility.” We are all overloaded with content today so visibility is not the struggle it once was.

Ellen gave an example of effective strategizing from one of her longtime clients: McCarthy Building Companies, Inc. She said the company has “put considerable resources into its use of technology and the best design phase management systems and expertise.”

**“THEY ARE
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RELEVANT.”**

One specific technology McCarthy pioneered is virtual reality that allows clients to experience immersive tours of their buildings.

“To this end, we crafted custom pitches about McCarthy’s innovative use of this technology and invited media to experience it firsthand with a mock-up at McCarthy’s office,” Ellen said.

It worked. *The San Francisco Business Times* wrote an article focusing on McCarthy’s use of virtual reality technology on healthcare projects. It was also featured in *Building Design + Construction* magazine.

Now that McCarthy has won the media's attention, they can leverage this to pursue speaking opportunities at conferences. The press release created this chain reaction.

"Developing professionals as thought leaders is a big thing in distinguishing them in their expertise," Ellen said.

When Ellen and her staff at Blattel Communications craft press releases, she said, "We put ourselves in the client's shoes to find out how to differentiate them and get exposure in meaningful ways."

In addition to individual firm successes is the multi-firm press release, often a result of a project award. Ellen understands how important project awards are to any A/E/C firm, yet some firms are overlooked in these announcements.

Many of us not representing developers or architects have experienced this firsthand. We may feel frustrated by this oversight, but Ellen says it just comes down to simply asking the developer or architect leading the charge to include our firm, which she often does on behalf of her clients.

"They are usually not thinking of it and are very receptive when asked," she said, adding that in that same phone call, she will mention that her client would be happy to submit a quote or be listed as a potential source.

Best Practices

Vladimir cautions against saving your press release for a specific media outlet so they have the first shot at publishing the news. When other editors and publishers catch on, they take notice that they weren't your first option.

"The majority of people aren't that way, but I have a handful who are that way in the Bay Area," he said, "I tell people, in your interest, just send it out all at once and see who gets it in first."

We want to be on the media's good side, so, in addition to not playing favorites, a savvy marketing

"THE STORY IS WHAT'S CAPTIVATING. YOU NEED TO TIE IT ALL TO THE STORY TO EXPLAIN TO THE READER WHAT IT IS YOU'RE TRYING TO TELL THEM."

person will know what information is proprietary and confidential versus public.

“I noticed that some companies are extremely secretive about financial details of transactions, and to a certain degree I don’t understand that because we have access to public documents,” Vladimir said, “Hiding that information just makes it harder for us, but we will find it. What does the company gain by adding another five steps on our behalf?”

Some of the press releases Vladimir receives even lack an address of the real estate deal.

By providing the information upfront, Vladimir said, you are ensuring that the reporter has the most up-to-date information. Being informative is key.

“The people who do collaborate and share the information elevate the entire industry, versus keeping it secret,” he said.

While press releases need to be concise, they also need to contain the pertinent information and be interesting.

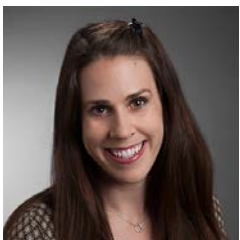
“Think about the story when putting together the content,” Vladimir said. “The story is what’s captivating. You need to tie it all to the story to explain to the reader what it is you’re trying to tell them.”

The story should also be incorporated in the quotes. Quotes that are stilted and provide no valuable information to the reader should be revised.

So how should we position our quotes? The quotes should support the information you have already provided and even add to it if needed. To come up with the right quote, Vladimir recommends that you listen to NPR interviews.

“You’ll listen to one and you’ll get seven examples,” he said. While coming up with quotes that sound as if the person is talking in an informative manner can feel unnatural at first, it can be learned and can make the difference in whether or not your press release gets picked up for publication.

About the Author:



Shannon Daggett has been a journalist and worked for several years as a marketer for a law firm. Currently, she is the Marketing Manager at Langan, an engineering firm for ground and below. She can be reached at 415-955-5288 or sdaggett@langan.com.

LOVE AND ROI

Branding Q&A With TheorySF

By Justin Nagy



Russell Quinan is Co-Founder and Chief Strategy Officer at TheorySF, a San Francisco-based marketing agency that applies science and creativity to generate brand love and Return on Investment (ROI). Russell and Chip Sheehan, Co-Founder and Chief Creative Officer, will speak at SMPS SFBAC's October program titled The Power of Brand. We caught up with Russell to cover some of the basics of branding and find out what we can expect at October's program.

Let's start with the basics. What is a brand?

A brand is a promise; an expectation of an experience. It's the X factor that makes one product stand out over another.

So then branding is about finding differentiators?

Partly. Brands live in the mind of the consumer: the brand is not what we think a product is, it's what the consumer thinks about that product. We have to understand the customer first. Branding is also about finding the right audience for each brand—the audience that shares your beliefs, attitudes, and values—in order to make a connection. So our first step in the branding process is to assess the market. This involves looking at our ourselves, evaluating our competition, understanding industry trends, and, most importantly, talking with customers.

Right now we're working with an architecture firm on a complete rebrand. We started by talking to their clients, as well as market leaders who are their partners and collaborators, to understand how the firm is perceived

today. We learned that the firm’s brand as it exists in the minds of their clients does not match their current identity, so that has led to a whole new brand position that will better connect with their key audiences.

When you say “rebrand,” are we talking about a new logo and website, or is there more to it?

We tend to think of a brand as a firm’s name, brand architecture and positioning, logo, identity system, iconography, website, and so on, but it doesn’t end there. Everything, down to the smallest detail, can be a brand experience.

That sounds like a big investment. What drives a firm to take that kind of action?

“IN THIS NEW ORDER WHERE EVERYTHING IS RESEARCHED, YOU HAVE TO BE FOUND ONLINE OR YOU’RE IN TROUBLE.”

Things have changed. There’s a big challenge for marketers now: the internet. Today, the average consumer will review 10.4 sources of information before making even a simple purchase. A big ticket item like a car: 18.9 different sources of information. With all this information, customers know a lot about your brand—what to expect from the experience of working with you—before they ever speak with you directly. In this

new order where everything is researched, you have to be found online or you’re in trouble.

Do you see professional services firms adapting to this challenge?

Professional services firms are at the slow end of the spectrum when it comes to adapting to changes in the market. We see newer firms that are born in the digital age take to it more quickly, but, for more established firms, changing a business like that can be like trying to turn an aircraft carrier around. Still, some are adapting by necessity because the firms that invest in branding are winning work.

You mention the importance of being found online. With all of that information out there, how do we stand out?

We’re all so bombarded by messages now—an average of 10,000 per day

for each of us—that relevance is the only way to break through the clutter. Your brand marketing has to be telling the right story to catch attention and compel action. That’s why we invest up front in understanding the customer, how they think, what their desires, hopes, and dreams are, so that we can tell a relevant story.

What can we expect for October’s program?

We’ll start with a primer on branding, including the concept of brand equity and how to develop it. We’ll show some very cool creative examples of how to capture brand equity and use it for differentiation. There will also be an interactive brand assessment exercise to practice some of the concepts. We want everyone to be able to take something tangible away from the program.

“WE’LL JUST HAVE TO FIND THE DIFFERENCES BETWEEN ALL THE ‘SAMES’. THAT WILL BE THE FUN PART!”

And what if everyone in the audience comes up with the same differentiators?

We’ll just have to find the differences between all the “sames.” That will be the fun part!

About the Author:



Justin Nagy is the Marketing Manager for Enovity, a firm of engineers who operate, maintain, and optimize facilities to assure higher performance places. He currently serves as the Communications Director for SMPS SFBAC. Justin can be reached at 415-983-3613 or jnagy@enovity.com.

One of the Basics

The “Org Chart”

By Al Anderson

I got my first job in the A/E/C industry in 2002. I was hired as a marketing coordinator for an engineering firm, and on my first day my new boss was eager to get me started, so he asked me to make an Organization Chart. Naturally, I said “Great!” but I knew nothing about “Org Charts,” had never thought about Org Charts, and certainly had never made one. I asked my boss what program they typically used to make Org Charts, and he said he wasn’t sure what was typical—he suggested trying PowerPoint. This was an unlucky suggestion for me, because in 2002 I had barely played with PowerPoint, but had never really used it. Nonetheless, there I was, on my first day in the industry, sitting at my new desk and preparing to make my first Org Chart. My feelings began to sink fast, and tiny beads of sweat began to appear on my forehead...

“TO ME, THE ONLY PROGRAM YOU SHOULD USE TO MAKE AN ORG CHART IS ADOBE INDESIGN.”

But let’s move away from this nightmarish scene. This issue of *The Shortlist* is our first in some time that is open to non-members as well as members, and the theme of this issue is “Back to Basics,” and Org Charts are certainly one of the basics of our industry—it is certain that anyone who wants to be a marketer in the A/E/C industry will eventually have to make one.

Since that memorable first day I’ve made many Org Charts in PowerPoint, and I’ve seen and worked on Org Charts in several other programs, such as Visio, Excel, and Word, but...I don’t recommend any of them. Some people I respect say that Adobe Illustrator is good, but I’m not certain about that. To me, the only program you should use to make an Org Chart is Adobe InDesign.

In fact, if you are interested in our industry, or new to our industry, you need to get and learn Adobe InDesign. I realize that some of you reading this are in engineering firms that are always subconsultants, and you do pretty much everything in Word. Nonetheless, you should tell your boss that you must

have InDesign. At the very least, the knowledge of it will serve you well if you are ever laid off, but knowing this program has many benefits, not the least of which is that you can use it to make excellent Org Charts.

In our opening feature article, Erin Clinch described what it's like to work in each branch of our industry: Architecture, Engineering, and Construction. I have now had the privilege of working for all three branches, and I can tell you that each branch has different needs. Currently I make Org Charts for

“... THE GOALS OF THE PROPOSAL AND THE CORRESPONDING ORG CHARTS ARE QUITE DIFFERENT.”

large military construction projects. An Air Force Colonel looking at a proposal wants to be convinced that my firm knows what it's doing to make the project on schedule and under budget, and wants to be very clear about who is doing what. On the other hand, a reviewer of an

architectural proposal for a new building for the San Francisco Unified School District might not really know what she wants in detail, but she wants to be inspired and excited about your firm. So the goals of the proposal and the corresponding Org Charts are quite different. Below are my clichés of the pitfalls of making an Org Chart for each type of firm.

The Architectural Org Chart

When you make an Org Chart for an architectural firm, the first person who reviews it will hate it. It needs more color! It's boring! Can you put in curved lines? A second person will then come to review it, and will agree that it's bad, but will completely disagree with all the suggestions of the first person. Can you put in shading? Can it be more 3-D? Can each box have a picture of the design in the background? In the end you will have a colorful, beautiful Org Chart that won't make the slightest bit of sense to anyone.

The Engineering Org Chart

The engineers like your chart, but think you need to add more lines because some of the people need to report to more than one person. Oh, and you need to add more people, and you need to put some footnotes in the boxes to explain things more exactly, and maybe even put some comments in the boxes in 6-point type just so there's no misunderstanding about anything. So, in the end you will have a very accurate, exact document than no one can read or stand to look at.

The Construction Org Chart

They're pretty happy with the Org Chart because all the names are spelled right, the lines go to the right boxes, and it's in color and not handwritten. So enough of this silliness—let's start building!

I admit there is some exaggeration here (slight), but the point is that when it comes to Org Charts the architects look for creativity, the engineers look for precision, and the construction people look for practicality, and sometimes it's your job to help the architects be more precise, and the engineers to be more practical, and so on. Ultimately, the good Org Chart is the one that satisfies and pleases your client. Always remember that if an Org Chart pleases you and your co-workers, but confuses or annoys your client, it's worthless.

And now for some practical pointers. Rather than hear my opinion only, I solicited opinions on Org Charts from Shannon Daggett, Tricia McGuirk, and Alicia Magdaleno, and thank them very much for their gracious input, because I really learned some new things by looking at their charts, such as the following:

- **Put Photos of Your Key Personnel Into the Chart.** This is something I've never done before. I guess I've been concerned that some of my co-workers might scare the client. In the examples I saw, the photos had an appealing effect, however. The picture was in a circle next to the box as shown below.



- **You Don't have to Put Lines in Your Org Chart.** This is an interesting look—if you just use columns and don't put in the standard lines it does have a pleasingly minimalistic effect. This would probably be difficult to pull off if the chart is complicated.

- Lastly, I was shown a chart that was the ultimate architectural Org Chart, very creative and interesting. It used interlocking circles instead of boxes. Unfortunately, I have neither the time nor space (nor even the skill) in this article to reproduce it, but this is the kind of Org Chart that an architectural review board would probably love—on the other hand, if you sent it to the Army Corps of Engineers they might suggest random drug testing.

Now for my pointers, gleaned over 14 years of trial and error. Interestingly, my contributors above didn't follow all my rules below, which reminds us that Org Charts are not an exact science. Here are my tips:

- Use Adobe InDesign.
- If possible, make your Org Chart on 11x17 paper. Check your RFP carefully to make sure they accept pages in that size.
- **Boldface all your text and never go lower than 8-point Bold.** I think plain text looks “weak,” and it’s better to go smaller and bold than larger and plain. You might have thought I was joking above about 6-point text, but I have received more than one Org Chart from other firms that have 6-point text and are virtually unreadable. If the client can’t read the Org chart, or has to strain to read it, it’s worthless.
- Use Arial for your font in the Org Chart. However, for the text of your proposal I recommend using Times New Roman 12-point (but discussing that would be the subject of another article).
- Use dark colors. I know people love earth tones, but I recommend dark colors and yellow or yellow-ish text in the boxes instead of white. Yellow reads better than white in a dark box. Whatever color you are using as fill, put some black into it so that it’s dark.
- Put a border around your boxes. This makes them look “stronger” in my opinion.

“IF THE CLIENT CAN’T READ THE ORG CHART, OR HAS TO STRAIN TO READ IT, IT’S WORTHLESS.”

Let me show you what I mean. Here are some actual boxes I have seen (with only the name changed);

Program QA/QC Manager

Corporate Safety Director
John Smith

GEOTECHNICAL

Not to be presumptuous, but these seem “weak” to me. Below I have re-done them using the principles above.

Program QA/QC Manager

Corporate Safety Director
John Smith

GEOTECHNICAL

or

Corporate Safety Director
John Smith

Incredibly strong and beautiful, are they not? I know what some of you are thinking: you’re not that crazy about my boxes either. That’s the maddening thing about Org Charts—there are many opinions, and some ways are clearly better than others, but finding the right way for your particular proposal is always a challenge. In any event, I hope you’ve received some helpful information and perhaps some useful tips about that most basic yet trickiest of exercises: making a decent Org Chart.

About the Author:



Al Anderson, CPSM, is the Proposal Manager for Nova Group, Inc., a construction company located in Napa. He has been a member of SMPS for 11 years and is the Managing Editor of the Shortlist.



Build Business Conference Overview

Compiled by Traci Vogel

Philly in August was hot, humid, and hectic. Hundreds of marketing professionals gathered at the Philadelphia Marriott Downtown to learn, mix, and partake of the Philly culinary delight known as the cheesesteak. From the opening keynote by Ben Casnocha on “The Start-Up of You: Transform Your Work and Career with Entrepreneurial Thinking,” to the end-note speech from Caspar Berry on “Kill the Company: End the Status Quo, Start an Innovation Revolution,” the theme was rethinking traditional marketing elements to “synthesize” something new.

If you weren’t able to make it, or couldn’t drop in on every session, don’t worry. We have a few highlights brought to you by SFBAC attendees.

CONTENT MARKETING | Right Person, Right Message, Right Time: Bringing Context to Content for Big Impact

Presentation by Tim Asimos, CPSM, Vice President, Director of Digital Innovation, circle S studio

One of the big questions in content marketing is, “What does my audience want to read?” As expert Tim Asimos reminded us during a standing-

room-only session at Build Business, it's not enough just to create good content. To be most effective, your content needs to be ultra-targeted to your audience. In order to create targeted content, you need to know some details about your desired clients.

What's their long-term goal? What are they trying to accomplish immediately? What problems are they trying to solve in their role? Most importantly: If they're looking for service providers and selecting from a pool of equally qualified providers, what triggers them to select one firm over another?

“THE END GOAL OF CONTENT MARKETING IS TO CREATE RELATIONSHIPS.”

A good way to formalize this information is to create buyer personas. A buyer persona is a research-based representation of who your buyers are and what drives their decisions. Interview actual people to find this information. Having a third-party conduct these interviews is best.

Once you've gained insight into what kind of content will best engage your prospective clients, you need to consider another piece of context: where are they on the buyer's journey? Are they just beginning to be aware that they have a problem, or are they already informed and looking for specific differentiators? Where will they go to find this information?

The end goal of content marketing is to create relationships. That's why the more tailored your content can be, the better. — *Nicole La, Experience Director, TEECOM*

CLIENT MANAGEMENT | Strategic Client Management: Retain and Grow Your Most Important Assets

Presented by Wally Hise, PE, Vice President, HDR Engineering, Inc.

Setting up a strategic client management program comes with a lot of challenges. The primary elements to figure out up-front are: What tools will you use? How will you fund it? And do you have active support from your upper management?

Client management isn't a marketing program. It's part of your firm's strategic plan. The purpose is to make sure that your firm delivers high-value results to strengthen existing client relationships. It's a long-term strategy that won't pay off immediately, and it's on-going. Think of it as a coaching program versus a training program.

Why is client management important? For the majority of firms, the top 20 clients represent 25-40% of revenue. The lower half of clientele are often not profitable. You want to keep those top clients happy.

Client management strategy begins with identifying these top clients.



Choose clients with whom you have a positive relationship. Create client profiles to identify what they value and how they perceive your firm.

Your strategy should be to establish multiple relationships across your client's organization.

Multiple touch points give you greater access.

Research your target clients' markets. Know who their competitors are and what their business challenges are. This will help you understand where they will be two to three years down the road, and enable you to position your firm to provide their future needs. – *Traci Vogel, Marketing Manager, TEECOM*

MARKENDIUM

Markendi-what?

In case you were curious, MARKENDIUM, the SMPS Body of Knowledge, was unveiled and sold for the first time at the Build Business Conference. I've been intrigued to lay my hands on the mysteriously titled publication since I got word of its development at the Presidents' Leadership Symposium earlier this year in Alexandria, VA, at SMPS National's headquarters. And at \$159 for the six-book collection, it's a pretty good deal.

MARKENDIUM was created to serve as the leading educational resource for up-to-date information and best practices for marketing and business

development professionals in the AEC industry. The collection comprises six individual books that define the key domains of practice: Marketing

“THE BEST PART IS MARKENDIUM INCLUDES REAL CASE STUDY SCENARIOS, THEORY-INTO-PRACTICE TIPS, REFLECTIONS, AND A GLOSSARY OF TERMS.”

Research, Marketing Planning, Client & Business Development, Proposals, Promotional Activity, and Management.

It's my understanding that MARKENDIUM will eventually replace the old relic that most industry veterans and all Certified Professional Services Marketers (CPSM) are likely all too familiar with (a.k.a. the seemingly 40-pound Marketing Handbook for the Design and Construction Professional, 3rd Edition).

The best part is MARKENDIUM includes real case study scenarios, theory-into-practice tips, reflections, and a glossary of terms. What I haven't yet discovered is how this will change the CPSM exam or study materials, but it will be at least a year until this is required as reading material with a revised set of test questions.

You can purchase MARKENDIUM in print format on Amazon as six individual books for \$26.50 each. Sorry, but the box set was only for sale at the Build Business conference and is currently not available online. There is also a series of six online courses, each of which is interactive, self-paced and about 25 minutes long, at <https://onlinelearning.smps.org>.

Here's a video for more info: <https://m.youtube.com/watch?v=eeEkP9ua-v8&feature=youtu.be>

— *Vanessa Pelletier, Marketing Manager, FME Architects*



The Network

Welcome to The Network, our regular column mapping SMPS SFBAC members on the move. We want to hear about your notices of promotion, job changes, firm mergers and acquisitions, and office openings or relocations. Please send updates to: SMPSSF@gmail.com

It was a summer of promotions for SFBAC members! Join us in congratulating the following on their upward mobility:

Moves & Promotions

- **Susie Smith**, Marketing Director at KPFF Consulting Engineers, has been promoted to Associate.
- **Michelle Martin** has been promoted to Higher Education Practice Manager at SmithGroupJJR, working out of the firm's San Francisco offices.
- At TEECOM, **Nicole La** has been promoted to Experience Director, Traci Vogel is now Marketing Manager, and **Cassie Salgado** is now Marketing Assistant.
- **Michelle Gale** is now an independent A/E/C marketing consultant specializing in proposals, presentations, writing, and graphic design. You can contact her at michelle@mgalemarketing.com.
- **Katelyn Surprenant** has been promoted to Marketing Coordinator at RIM Architects.
- **Guidepost Solutions'** Oakland office has expanded at a new location: 180 Grand Avenue, Suite 400.

Anniversaries

- **Gensler** celebrates 50 years in business this September.
- Real Estate Services firm **stok** celebrates its 8th anniversary this year.

Upcoming Events:

MENTORING PATHWAYS INFORMATION SESSION

September 28, 6:00 pm | 1333 Broadway, Suite 601, Oakland

THE POWER OF BRAND

October 20, 11:30AM to 1:30PM | 424 Clay Street, San Francisco

This interactive presentation will explore brand strategies, building blocks, communications, and more voodoo to help you leverage your unique brand position for competitive advantage.

EQUITY BY DESIGN

November 17, 8:30AM to 10:30AM | 130 Sutter Street, 6th Floor, San Francisco

Equity by Design [EQxD] is about transforming the future of the A/E/C industry, challenging the gender inequality that lingers throughout the A/E/C industry. Join us for this informative and empowering session.

2017 SMPS PACIFIC REGIONAL CONFERENCE

February 15 - 17 | Hotel Captain Cook, Anchorage, Alaska

more events: <http://smpssf.org/calendar.php>

New and Transferred Members



Marika Docous
Marketing Coordinator
Degenkolb Engineers



Lily Golabchi
Marketing Coordinator
STUDIOS Architecture



Katy Livingood
Marketing Coordinator
Dome Construction Corporation



Chelsiah Scouras
Marketing/BD Coordinator
BKF Engineers



Kirra Stutchbury
Marketing
stok



Jennifer VanderArend
Marketing Manager
HMH



Brian Bellanca
Business Services Manager
Vision Consulting Services



Danielle Stauff
BD Coordinator
Rosendin Electric, Inc.



Peggy Wai
Marketing Coordinator
KMD Architects

New and Transferred Members cont.



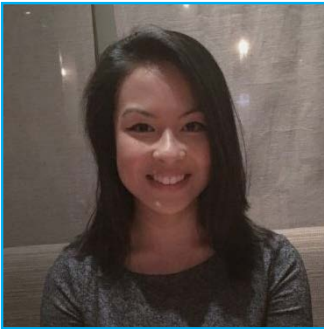
Carlos Velazquez
President/CEO
Epic Scan



Cassie Bustos
Marketing Coordinator
McCarthy Building
Companies



Cassie Salgado
Marketing Assistant
TEECOM



Michele Patena
Proposal Manager
Cumming Construction
Management

Additional Members: Rachelle Ageev, Marketing Director, GNU Group

New Member Spotlight: **Katy Livingood**

By Tina Barni



When Katy Livingood decided to attend the SMPS Marketing Bootcamp, she knew that she wanted to get involved. Katy is a Marketing Coordinator at Dome Construction.

“I learned so much at the Bootcamp and met great people,” said Katy.

Katy is now a member of the Communications Committee and will contribute to *The Shortlist*.

Katy is new to the A/E/C industry. She has a background in graphic design and animation.

“I look forward to gaining knowledge and skills to grow in the industry while meeting new people,” says Katy.

Fun Facts about Katy

Katy is a fan of both the SF Giants and St. Louis Cardinals. She enjoys visiting old movie theaters in San Francisco.



About the Author:



Tina Barni is a Senior Marketing Coordinator at Degenkolb Engineers. She is the Co-Chair of the Communications Committee. Contact her at 415.354.6511 or tbarni@degenkolb.com.

Committee Member Spotlight: **Bianca Flores**

By Tina Barni



Bianca Flores began her fascination with the built environment early in life. She grew up in downtown San Francisco surrounded by great architecture and unique buildings. Bianca knew she wanted to be part of the A/E/C industry. She is currently a Marketing Specialist at Turner Construction and is on the Communications Committee as a graphic designer.

“I have always been fascinated by the design and construction of buildings,” says Bianca, “There’s nothing more I wanted to be a part of.”

Bianca has been in the A/E/C industry for five years and has been involved with SMPS for three years. As a marketer in the A/E/C industry, she believes in the importance of adapting to new trends and technical lingo.

“I was motivated to join this committee to further enhance my skills and be a representation of my company in the industry,” says Bianca.

Bianca was on the 2016 SMPS Striving for Excellence Awards submission team. She was the graphic designer for the submission which won

Committee Member Spotlight (Cont.)

“Outstanding Extra Large-Chapter of the Year Award” at the 2016 Build Business Conference.

She plans to continue to be involved on the Communications Committee in the area of marketing materials, branding, and design.

“It was exciting to be the graphic designer for our submission and being able to transform the chapter’s successes into captivating visuals,” says

Bianca, “Through this, I was able to deepen my relationship with my peers. Of course, when you’re all trying to win, it becomes more of an exciting challenge.”



Fun Facts about Bianca

Bianca has been a volunteer for over 10 years at St. Anthony’s Dining Room in the Tenderloin District of SF. She is an extreme foodie that thrives off the new and unique foods in the Bay Area.

About the Author:



Tina Barni is a Senior Marketing Coordinator at Degenkolb Engineers. She is the Co-Chair of the Communications Committee. Contact her at 415.354.6511 or tbarni@degenkolb.com.

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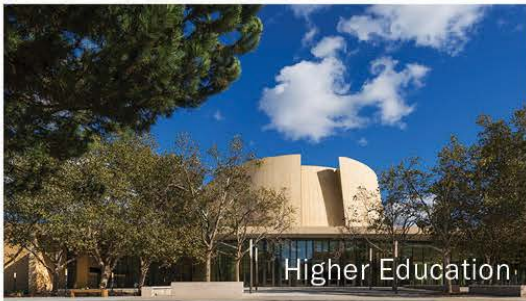
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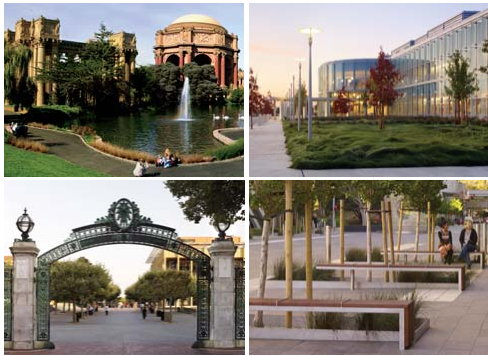
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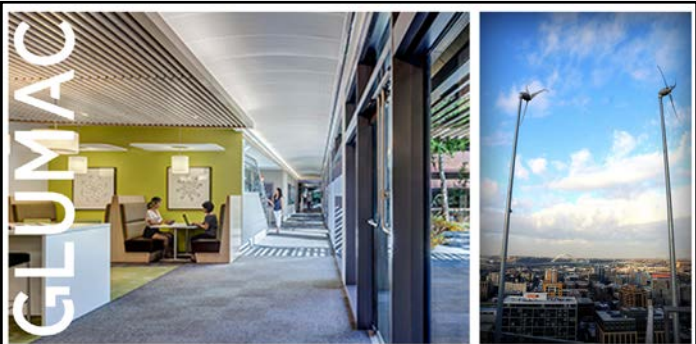
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