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Rules for Working with Owners



“If I’ve told you once...”

Rules for Working with Owners

BY MARY NARDONE, PH.D., P.E.

As an owner/client overseeing capital projects at a medium-size private university, the most frequent question I am asked by consultants is, “What works for you when you work with consultants?” (The second most frequent question asked is, “What doesn’t work?”) Over the years, I have participated in several panel discussions focusing on this topic, most recently at a women’s business conference. As I thought about this particular audience, it became clear to me that most of my advice for working with an owner really boils down to the fundamental lessons my mother taught me growing up in a household of six children.

1. Don't be late. Whether you are attending working sessions with our end-users, design meetings with senior administrators, construction meetings with the general contractor, or providing a proposal for design services or a request for additional service fees, don't be late—and don't miss deadlines. Tardiness makes an immediate impression that is difficult to erase, especially if it occurs more than once. Make sure the team members representing your firm understand this to be *your* rule.

2. Do your homework. This applies to your first proposal for services as well as to your ongoing interactions with us. If you are proposing for work on campus, we expect you have *examined our campus*—that is, checked out our web site, looked at our master plan, and walked the campus. When reviewing proposals or interviewing teams, we can tell when the consultant has not taken the time to get to know us—which, in turn, makes us less interested in working with them.

For companies already working with us, we expect you have already *tried to understand us*—that is, visited the campus enough to get the flavor of our culture and the logistics, studied our master plan, learned our general campus “facts,” examined our organizational structure and governance, and asked us a lot of questions. A lot of material can be found on the web, but sometimes you just have to ask: “Who are your peer institutions? Who will be attending the meeting? How will this decision be made? Is there a good example of this on your campus? What do you mean by ‘student formation?’”

3. Do your best. We really *can* tell how hard your team is (or isn't) trying!

4. Share your toys. Owners often don't spend enough time with other owners at their campuses, so it's always helpful when our consultants steer us toward another owner who has a good example of a project type or design element. Visiting a site *together* (i.e., owner and consultant) is a great way for you to get to know us better. Also, we may not know the tools of the industry yet, so a client meeting at your office—where we can see your smartboard or meet your BIM team—is always appreciated.

5. Stop complaining. We *know* we are difficult to work with sometimes...but we *are* paying the bills.

6. Actions speak louder than words. Sometimes, we hear a lot of talk from consultants but simply do not see the results. If you have ideas during the design stage, put them in a presentation graphically so we can better understand them and show us specific examples (from our campus or elsewhere). Ideally, show us *multiple options*; options mean you are including us in the design decisions.

If we choose to move ahead with certain ideas, make sure you *follow through and incorporate these ideas into the contract documents*. The university president or trustee will not forget what you told them (sold them) in a meeting many months ago.

7. We don't care if everyone else is doing it! This is a big one—and it's a fine line. On the one hand, owners want to see the trends on other campuses (as I noted under “Share your toys”), but we do not intend to jump off bridges just because everyone else does. This ties into “Do your homework”: Use care that your recommendations and examples are relevant to *our* campus context. This rule also applies to signature design elements; we don't care if you are doing it elsewhere, that doesn't mean it's the right fit on our campus.

If you should struggle with the owner's logic for not wanting a particular element or option, don't ignore these objections (hoping we will forget or give in). And never make the owner over-defend a position—remember Mom's number one reason, “Because I said so.”

8. Watch your language! A lot of the relationship between owner and consultant is developed through dialogues, often at design meetings, so word usage is critical. Pay attention to the campus vernacular; it can be a put-off to the owner if the context is off. For example, is it provost or academic vice president? Dormitory or residence hall? Campus green or quad? Student center or campus center? Board of trustees or board of governors?

At the same time, if you think your audience may not understand the meaning of an industry term (and you should always give this consideration), then just use a different (simpler) word. For example, do we have to call the windows ‘fenestration’ and the stairs ‘vertical circulation’ when speaking with the provost or the CFO?

If the owner uses terms you don't know, look them up later, so you can better interact on common ground. I've observed the most successful owner/consultant teams, with time, actually try to use each other's terminology—a real sign they have developed a mutual respect. But in the beginning, the burden generally is on the consultant not to put off the owner with too much industry jargon or references of an unfamiliar context.

9. Money doesn't grow on trees! Pay a lot of attention to costs and the budget. Most importantly, know the order-of-magnitude cost of things *before* you suggest them to our end-users or the president.

10. Keep your promises. This rule is related closely to budget management but also goes to schedule management, and usually surfaces during the advanced design stage of the project. Throughout the design process, the consultant has made suggestions and commitments to our end-users and high-ranking administrators, and now the consultant is having trouble finishing the drawings on time, or within budget. The owner has very little patience for this at this late stage. When you promise us something, we expect you will deliver. (In addition, breaking this rule usually implies some of the other rules have been broken already.)

Working with an owner is a pretty simple process: Just follow these rules that I'm sure you've been told at least once, if not "a thousand times."

P.S. I know some of these rules can feel like a real burden. But please try to remember: *When you have your own campus, you can make the rules!* ■

Right and on the cover: An aerial view of Boston College, the author's campus.



PHOTO: MARK FLANNERY

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”

About the Author



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Mary Nardone's lessons are important for marketing staff to abide by, but they are critical for project staff at our firms. What can/should you do with this article if you work in marketing or business development and you know your principals or project staff need to heed Mary's advice?

Well, when my mom got frustrated with us (I'm the second of seven kids) and we didn't listen to her, invariably she'd resort to saying, "Just wait until your dad gets home!" Extending the analogy to A/E/C firms, this is equivalent to the frustration of an owner who has reached their last straw with someone at your firm. We never want a project situation to get to this! How can the marketing department help prevent this situation?

Start by remembering one of my mom's rules: "It's nice to be nice."

Then apply some "preventative medicine": Send Mary's article out to everyone in your firm now — before any owners get frustrated. She offers good advice for working together collaboratively on *anything*, not just projects.

Discuss this topic at your firm's next marketing meeting; sharing stories of how someone proactively did the things Mary recommends or was able to fix a bad situation are important lessons for other staff.

Send a copy to the principal and project staff when you hear about a project team struggling with a client.

When you hear a "learning opportunity" for a colleague, go visit that individual and take a copy of the article. Tell them, "Read this and then call your client." How do you muster up the nerve to do this? Well, none of us wants to get Dad's wrath when he comes home, so think of this advice as a way to help your sibling/co-worker in a sticky situation. Tell the individual, "I read this article and thought it might help." Suggest they add a little humor to illustrate to the owner they're human, "Send it to your client as a mea culpa and say, 'I promise to take Mary's advice and not do this again!'"

About the Author



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