



The 10 Biggest Winning and Losing Behaviors In Business Development

Earn CE hours for this Session

Participants must:

- 1. Sign in using attendance sheet in the back of the room.
- 2. Attend at least 95% of the session.
- 3. Complete the session and post-program evaluation.

Additional instructions will be emailed to attendees requesting CE credits. If requesting AIA credits, please provide your AIA number so we can report your attendance. For questions regarding continuing education credits, please contact **Jo-Anne Torres**, Manager of Professional Development and Continuing Education, at **Jo-Anne Torres Qage.org**, or (703) 837-5360.



Earn CE hours for this Session





1.0 AIC CPD Credit | AGC of America has been approved to offer Continuing Professional Development (CPD) credits for qualifying programs by the <u>American Institute of Constructors</u> (AIC).



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Learning Objectives

By the end of this session, participants will be able to:

- Identify the 4 Key Elements In Creating An Intentional "Go To Market Plan."
- Discuss reasons why "Networking" Is Not Enough Market Intel Must Be Gathered.
- Examine How to Client Data Mine To Get To The Root of A Client's Key Decision Drivers.
- 4. Recognize the questions that reveal the real buying criteria.
- 5. Create A Winning Message That Resonates.



Hal L. Routh



President, Equalizer 9

Randy Fichera



Vice President of Commercial Services, Barnhill Contracting Company Raleigh, NC

Craig Floyd



Regional Growth Leader,
Palmisano Construction
Nashville, TN
New Orleans, LA





THE 10 BIGGEST WINNING & LOSING BEHAVIORS IN BUSINESS DEVELOPMENT





AVERAGE INDUSTRY WIN RATE

20%





BEST OF THE BEST

45%



THE IMPACT OF WIN RATE



Current	<u>Pursuits</u>	Win Rate	<u>\$ Won</u>	Net Profit	
	\$1 billion	20%	\$200 million	\$4 million	
Future 1	\$900 million	35%	\$315 million	\$6.3 million	57% 1
Future 2	\$850 million	45%	\$382 million	\$7.6 million	90% 1





Losing Behavior #1

NO PLAN OF ATTACK





"The essence of strategy is choosing what not do." -MICHAEL PORTER, PROFESSOR, HARVARD BUSINESS SCHOOL





Winning Behavior #1

A VERY INTENTIONAL "GO TO MARKET" PLAN





KEEPING SCORE

Sales % to goal

Win rate

Trend analysis





HERE WHERE



SECTOR FOCUS EVALUATION MATRIX



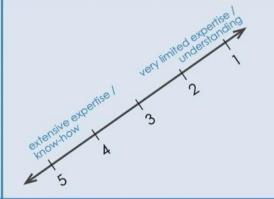
PROFITABILITY

CAPABILITY

CONSIDERATIONS

- # of competitors
- complicating factors
- barriers to entry
- risk profile

Town mordins ited

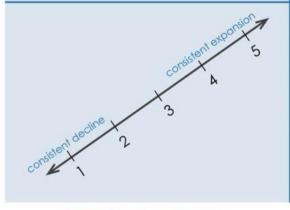


CONSIDERATIONS

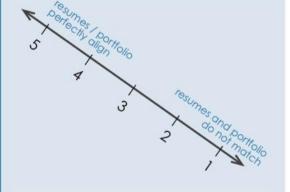
- manage risk?
- know the pitfalls
- depth of resources
- experts on team

CONSIDERATIONS

- volatility / cyclical
- demographics
- trends







WIN-ABILITY

CONSIDERATIONS

- can we tell a story?
- team with resumes that matter
- portfolio of relevant experience







RELATIONSHIPS, NOT TRANSACTIONS

Create target client list

Stay close even when zero opportunities



THE BEES

- Architects
- Civil Engineers
- Commercial Real Estate Attorneys
- Commercial Real Estate Bankers/Equity Funds
- · Commercial Broker
- Major Subcontractors
- · Land Planners
- Geotech Firms
- Furniture Vendors











COMMUNITY ENGAGEMENT







for ACME Construction				
OUR SALES GOALS ARE:	SALES TO DATE	SALES % OF GOAL	WIN RATE FOR THE YEAR	
\$100 M	\$ 80 M	80%	36%	
OUR PIPELINE GOALS ARE:	PIPELINE TOTAL	Top-out/Contra	PIPELINE % OF GOAL	
\$500 M	\$ 410 M	82%	82%	

SECTOR FOCUS	TARGET CLIENTS	EXISTING CLIENTS	THE BEES-NETWORK / INFLUENCERS	COMMUNITY/ORGA NIZATIONS
K-12	Lee Oxford Wake Kent Poxleyr Brunswick Salem Johnson Cauley Orange Westminster	Biddell Co Carson City	LKMH Smith Arnot Lynch Smith Edwards Lowell Mosely Becker Clark Goins Bunn	A4LE School Board Assn
Mixed Use	Ashley Partners Kaplan Morgan Turncurry Hoffman Grant Ventures Role Grant Young Partners East Partners Zimmer Partners Crescent Cloud Hannover Kanely Hines Dexter CAM Ventures	River Realty Mulder Kennedy	Davis Cling Design New Architecture BOA SI Capital Mcmurlry S&BE WHite Lynch Smith Gensler Federal Partners CBRE Topheer Group	ULI Naiop







Losing Behavior #2

OVER RELIANCE ON LAST MINUTE RFPs

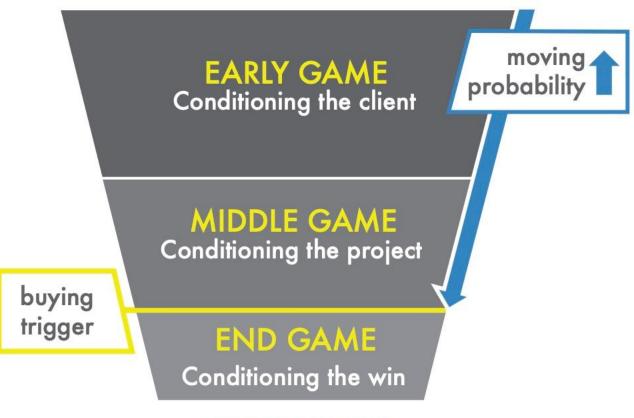




GAME

PREGAME

Conditioning the market



NEXT GAME

Conditioning the future







Losing Scenario #1

PREGAME

EARLY GAME

MIDDLE GAME

Brief touchpoint

Learn of

opportunity

buying trigger

END GAME

RFP or presentation

NEXT GAME







Losing Scenario #2

PREGAME

EARLY GAME

MIDDLE GAME

END GAME

buying

trigger

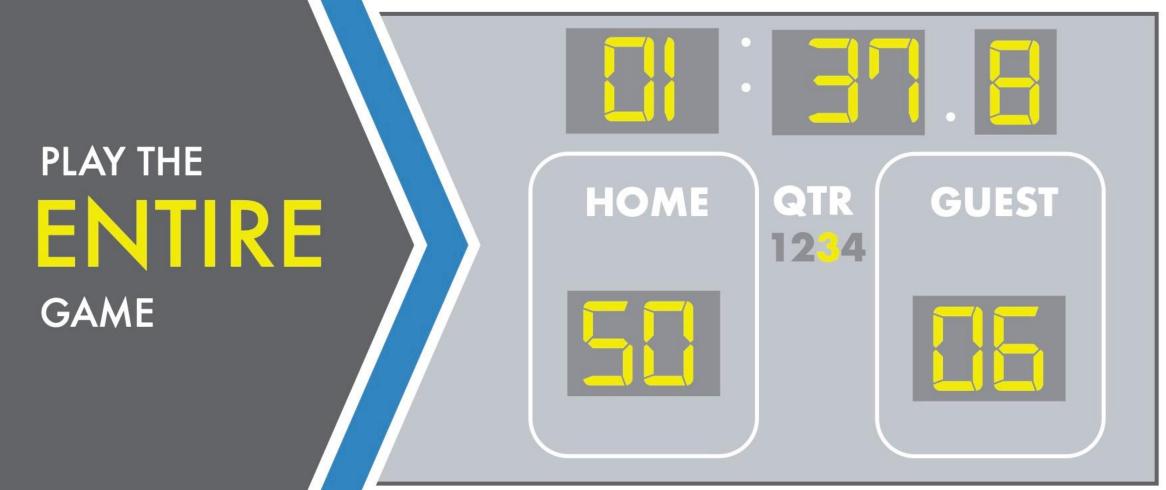
Rock through the funnel

NEXT GAME













Winning Behavior #2

PLAYING THE ENTIRE GAME











Losing Behavior #3

POOR PROSPECTING





"FLIPPED"

- Little early prospecting, data mining, zippering
- Counting on RFPs to the masses
- Low win rateRocks though funnel





"THIN"

- Little early prospecting
- Dependent on a few leads
- Can't afford to decline any pursuits
- Win rate could be okay but limited volume and may take on risky work





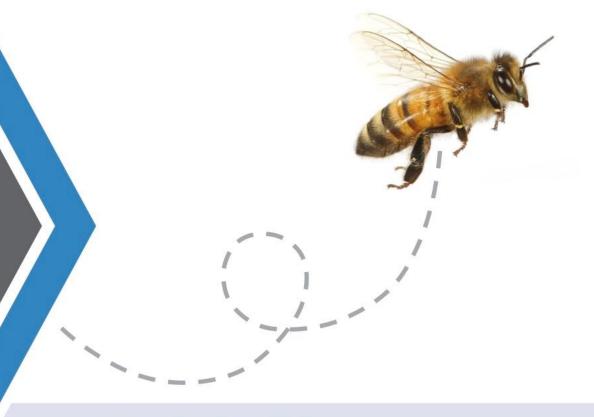
Winning Behavior #3

AGGRESSIVE & CONTINUOUS PROSPECTING





PROSPECTING & LEAD GENERATION



FOLLOW THE BEES.





PROSPECTING QUESTIONS

THE BIG 5 Q'S

- 1. What projects are you guys working on that would be a fit for us?
- 2. What projects don't have general contractors on board yet?
- 3. What are you guys pursuing now that we should be pursuing?
- 4. What are projects that you recently lost and who got it?
- 5. If you were me, what clients would you be getting close to right now?





"HEALTHY"

- Ample opportunities
- Affords ability to qualify and weed out
- · Playing the entire game, selectively







Losing Behavior #4

"THROWING UP"ON THE CLIENT







WE are so experienced

WE are so financially strong

WE have been in business so long

WE have built so many great projects

WE have the best people







ESTABLISH CREDIBILITY...

YES

But, we must address their PURPOSE, PAIN, & PASSION.



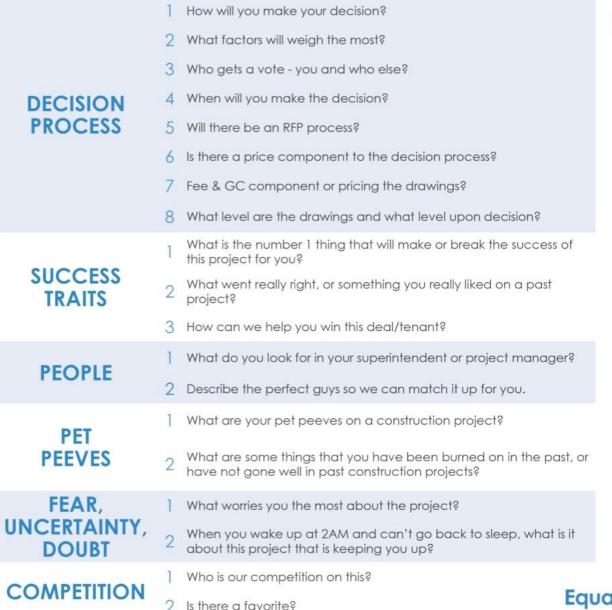


Winning Behavior #4

INTENSIVE CLIENT DATA MINING



CLIENT DATA MINING GUIDE Primary Questions











3 Can you give me an example or more specifics?

2 How so?

QUESTIONS









Losing Behavior #5

POOR RELATIONSHIP BUILDING





OUR TEAM

CLIENT TEAM

Kelly, VP

Jeff, BD

Janet, PX

Fred, PM

Ernie, Supt.

Joe Sr, Pres.

Joe Jr., VP of Development

Wendy, Director of Construction

Bill, Facility Manager

Lilly, Leasing





OUR TEAM

CLIENT TEAM

Kelly, VP

Jeff, BD

Janet, PX

Fred, PM

Ernie, Supt.

Joe Sr, Pres.

Joe Jr., VP of Development

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Winning Behavior #5

STRATEGIC CLIENT ZIPPERING





PEOPLE DO BUSINESS WITH PEOPLE THEY LIKE.





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Lilly, Leasing











OUR TEAM CLIENT TEAM Kelly, VP Joe Sr, Pres. Jeff, BD Joe Jr., VP of Development Wendy, Director of Construction Janet, PX Fred, PM Bill, Facility Manager Lilly, Leasing Ernie, Supt.





SEEK RELATIONSHIP BUILDING OPPORTUNITIES











ZIPPERING WITH A PURPOSE



Client Workshops (VE, Technology, etc.)



Project Tours





Losing Behavior #6

FAILURE TO SLOW DOWN & THINK ABOUT HOW YOU ARE GOING TO WIN





SYMPTOMS

No idea who the competition is

Zero thought on solving their problems

A proposal that is 100% boiler plate

Throwing together a presentation the day before

Always using the excuses of:

- If they don't see how good of builders we are...
- It all comes down to price anyway





Winning Behavior #6

A WIN STRATEGY & MESSAGING PLAN



WIN STRATEGY & MESSAGING PLANTM





THE **OPPORTUNITY** last update:

1/06/2019

CLIENT NAME:

State Division of Cultural Resources & State Museum of History

PROJECT NAME AND LOCATION:

State Museum of History Renovation & Addition, Mayberry

S AMOUNT:

\$200,000,000

DESCRIPTION:

Renovations to 150,000 sf, additions of 200,000 sf, plus 500 car structured parking deck.

Coordination of exhibit installation

DELIVERY METHOD:

CM-at-Risk

CRITICAL DATES: (RFP, presentation, preconstruction start, construction start, finish)

RFP expected early February 2019 Presentations late February 2019, precon start mid march 2019; Const start Spring 2020, Finish date of Fall 2021

OTHER MATERIAL FACTS:

Occupied construction, tight logistics, numerous consultants, C3PO architect, heavy involvement from state historic board

THE CLIENT'S WHY

1. Client's Mission Statement

The Division of State History Museums collects and preserves artifacts and other historical materials relating to the history and heritage of the state in a local, regional, national and international context to assist people in understanding how the past influences the present. Exec Director quote-At the State Museum of History, we are committed to creating a place where you can explore, learn, and enjoy programs, events, and exhibitions that celebrate the state's past, present, and future.

2. Ultimate Purpose

Create a place that can celebrate the history of the state for many generations to come

3. End User's Purpose(s)

Same

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4. Client's Biggest Fear

Funding timing and funding challenges; solutions for the parking puzzle; disruption to existing operations for patrons overall experience; the phasing-what goes in what order is complicated; a facility with flexibility and adaptability for the changing times and changing exhibits

5. Client's Definition of Success

A Facility that honors our state, and that we can be proud of for generations that is built with sound stewardship



THE MAJOR CLIENT STAKEHOLDERS

Name, Title	Personal Victory or Motivation	Key Project Issues
Ken Hughes, Executive Director	Ken creates a legacy facility that he can be proud to say he built for this state	Parking issue; budget/funding; phasing; making the right long term design decisions; Zero disturbance to patrons
Steve Jones, Architect project exec	Is able to develop a highly applauded design while being financially rewarding for C3PO Architecture	Parking challenge; phasing; staying on budget while also creating a compelling design
Frank Bureaucrat , Sco lead	Follows all SCO guidelines and is without controversy or litigation	Sco processes followed; budget adhered to; HUB goals met; Risks are mitigated
Kelly King, Facility Maintenance Mgr	Don't make his job harder while we are here	Facility easily maintained; durable finishes; warranty ease

OUR PROPOSED TEAM

Name	Role	Why Right for This Project?
Bob North	Project Executive	Iconic downtown Mayberry exp; CMAR expertise; Large Project expert, Museum Exp; Experience being invisible with Disney projects
Bob South	Superintendent/Site Operations Lead	Downtown Mayberry experience; CMAR expert; occupied construction expert
Tammy Dollars	Precon Manager	Large Downtown Mayberry Exp; C3PO experience; Museum Expertise; track record in reaching GMP goals
Linda Smith	Outreach Director	10 Successful Mayberry Projects with 30%+ minority participation
Joe Alphonso	Project Manager	Museum Experience; downtown Mayberry Experience; occupied construction exp

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Our Team + Role	Bob North, PX	Bob South, Supt	Tammy Dollars, Precon MGR	Linda Smith, Outreach	Joe Alphonso, PM	Name, Title	Zippering Opportunity
Client Stakeholders 🌗					W. 7//		
Ken Hughes, Exec Dir.	⊠				\boxtimes		Tour of 2 iconic Mayberry projects; lunch meetings
Steve Jones, architect PX	\boxtimes						Tours; lunch meetings
Frank Bureaucrat, SCO Lead	\boxtimes						Workshop- Demonstration of laserscanning applications and
Kelly King, Facility Maint MGR							Workshop- Demonstration of Bim to FiM applications
Name, title							
Name, title							

KEY ISSUE ANALYSIS (pain points, pet peeves, buying criteria, motivation factors)

Key Issue	Activity Offering Solution or Comfort	Benefit to Client (what's in it for them?)	Proof (quotes, stats, case studies)
Occupied Construction, challenging logistics	Detailed internal restack plan including timing-a 4 d restack model; show internal measures to create separation from patrons, noise and dust mitigation, and wayfinding for patrons, Create artifact protection plan and perhaps a chain of custody protocol; Detailed external logistics plan showing street closures, laydown, pedestrian and auto rerouting; perhaps Disney case study? Other case study? Show relevant occupied renovation successes	Zero disruption to patrons; Artifacts are safe and sound under our watch; we are invisible.	Quote from Mayberry Performing Arts Exec Director & Conv Center; Case study from Disney; Case Study on Logistics from County Justice 4 blocks away

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Passion for state and generating excitement in the project	Show connection to the state-# of native the state on team, Jim tells story of company connection to state; each NC native says in their intro- "The Smiths came to the state in 1750's." We hammer the message that this is more than a building-it's the story of who we are and we will bring passion everyday; create a list of outreach moments to tie the community to the project and the vision;	You get a partner that shares your passion for the state, and shares your mission. We will promote excitement for whats coming.	#of natives on team; Story of the company; #of iconic state projects
Systems-MEP, lighting, humidity tolerances	. Wayne Mott and other MEP experts on team to highlight precon plan to ensure maximum efficiency and correct design; commissioning plan	Your systems work on day one	Quote from past clients
Community Engagement & HUB Involvement	Create a HUB plan; show record of success; Highlight the minority partner relationship with CM team- not just convenience; Create an outreach plan to generate community engagement	You exceed your minority participation goals	Past record of hub success
Experienced Team and Temperament of Team	Show team experience in 1)CMAR/SCO, 2)Museum, 3)Iconic state bldgs., 4)Occupied Renovation, 5) Downtown Mayberry, 6)JV past successes; highlight individual team members relevant experience and talents as it relates directly to this project; Map of downtown Mayberry experience; Highlight how local our team is and how responsive we can be-especially in precon/pre-planning	Highly Responsive And Always Available	Chart of team highlighting 6 categories; map of Mayberry projects
Experiential Exhibits Experience	Talk to an exhibit installer or designer to understand what their challenges are -how we can add value during construction and after- create checklist of how we will bring value; Emphasis on how we offer flexibility and adaptability for future exhibits-show this virtually with a "behind the exhibit" look at systems that allow for "plug and play" functionality; accurate as-builts plan; Coordination plan with installers	no hassle execution of exhibits-they get done efficiently	Show Disney case study; air force museum case study
Precon and Budget Stewardship	How we control costs; how we mitigate inflation; how being very local saves general conditions; focus on problem solving in 1)MEP 2)Parking Puzzle, 3) Logistics/Occupied Construction, 4)Experiential Exhibits flexibility & coordination, 5)Artifact protection	Maximum scope for the minimum price. Tax payer stewardship	Past record of GMP vs final costs
The Parking Puzzle	We know what parking costs in Mayberry area; Offer solutions; Discuss P3 possible solutions	You get a partner with the relationships to solve the challenge	P3 Case studies of the Duncan, and riverview



GHOSTING (exploiting competitors' weaknesses)

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Relevant Competitor Weakness

Standing By Your Work & Unsuccessful Projects- Competitor #1 has the state building quality problem with SCO lingering; Also, Train Station had serious challenges for Competitor #1

Teams are not Proven JVs- Competitor #1 JV recently went badly; Competitor #2 JV not as proven as ours and certainly not in Mayberry

Prominent team members of competitors from out of town will hurt responsiveness and add significant OTL

Strategy to Ghost This Weakness?

We highlight our repair efforts of their quality problem as a relevant downtown project briefly- that's all-it will remind them of who did not stand by their work. Also, we highlight our history of successful projects with no client litigation in downtown Mayberry. "Please call any of our owners."

Our team has done 4 successful JVs(all in Mayberry) and our people have worked together. No learning how to work together on your nickel and your clock

Make sure they know where each team member lives and how long it takes them to get to architect or Museum offices. Show the email from the hotel asking if they could book us rooms if we won the project- others will need it but we will not-saving you \$ that can be put into more scope for the museum





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Losing Behavior #7

THINKING IT'S A NUMBERS GAME





Commodities are a NUMBERS GAME

Specialized services are a

FOCUS GAME





Winning Behavior #7

A ROBUST GO/NO GO PROCESS



GO / NO-GO GUIDETM



PROJECT:	DESCRII	PTION:
CLIENT:	DECISIO	DN:
 WILL THE PROJECT BE PR Will the client pay timely Is the decision based primarily on qualification (Not on price.) Are we comfortable with the client's ability to fund the project? Are the contract terms acceptable? Will the project meet our profit goals? (Ran a model) 	PES NO UNKNOWN SPENSION OF THE PROPERTY OF TH	DO WE HAVE CAPACITY AND CAPABILITY? 1. Does the project match what we do well? 2. We can mitigate all risks appropriately? 3. Can we field a team that can successfully execute this project? (Who are they?) 4. Can our preconstruction team dedicate appropriate resources?
	1. Will the client treat of people with respect 2. Will the client do whe right? 3. There are zero past exwhere this client exhi	our ? UNKNOWN at's Samples Sibited
, OVA 7.	unfair or corrupt prac	nices

DOES THE PROJECT HAVE A

HIGH PROBABILITY OF WIN?

		YES	NO	UNKNOWN
1.	Have we met the ultimate decision makers prior to end game?			
2.	Have we zippered up the relationship?			
3.	Have we data mined for the client's key issues?			
4.	Do we have a compelling win message developed?			
5.	Can we offer a team whose resumes match the project well?			
6	Is the probability of win 33%			

DO WE HAVE THE RESOURCES/TIME TO PUT OUR BEST FOOT FORWARD?

preparing / practicing a

presentation that resonates?

or greater?

1.	Does our marketing team have the capacity to put together a high quality and compelling message?	YES	NO	UNKNOW
2.	Are we able to put forth our best effort on all opportunities, with no competing deadlines?			
3.	Can we dedicate the time and energy required to articulate our win message?			
4.	Can we dedicate the necessary time to			

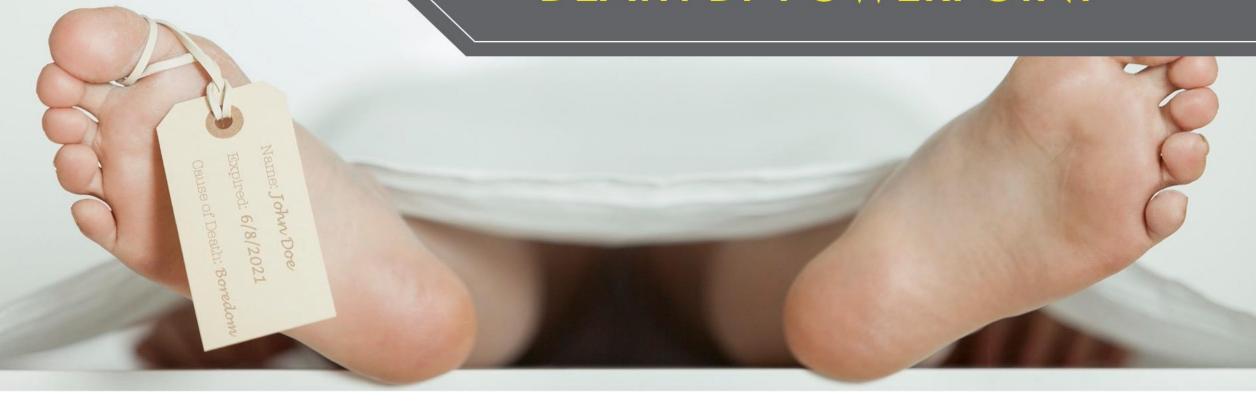






Losing Behavior #8

DEATH BY POWERPOINT









Special Attention During The Preconstruction Phase:

Supply Chain & Procurement

- Material selection input on availability
- Early purchases and delivery
- Lead-time management

Long-Term Durability & Ease of Maintenance

- Life cost analysis
- Design for easy maintenance access
- Durability assessment of finishes

Attention to Kitchen Details

- Cross contamination and allergy considerations
- Equipment layouts
- Food odor control
- Baset floor no trapped bacteria
- Code compliance inspections!

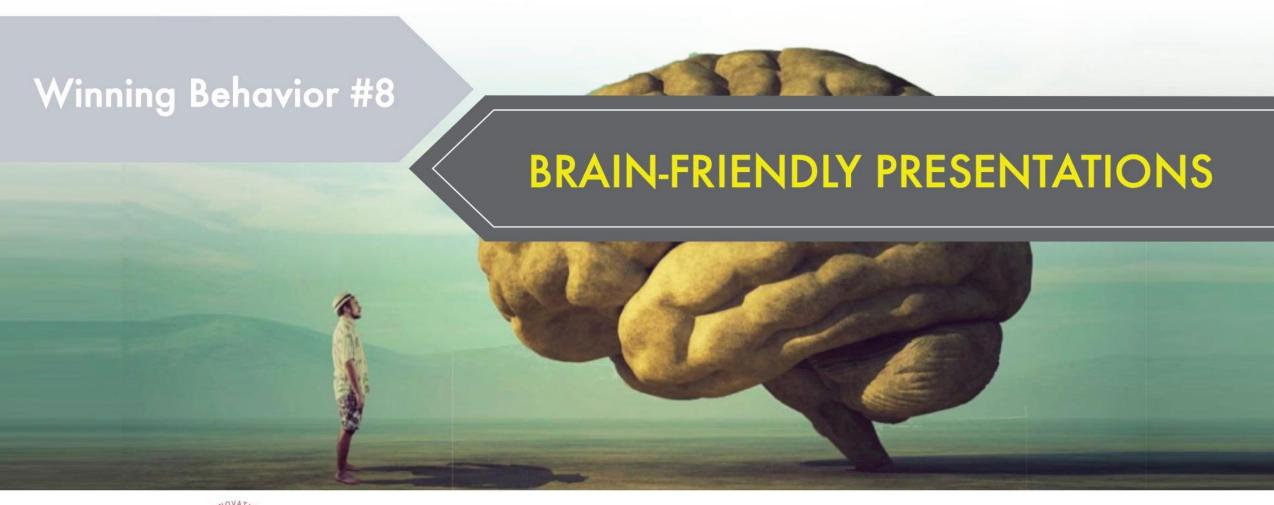
Special Attention During Construction & Closeout

Closeout & Training

- Accurate Digital As-Builts with BuildR technology
- Train staff on function and maintenance
- System component commissioning and testing
- Owner portal for instant access to the documentation you need. Training videos, warranties, maintenance schedules and more!











COST CONTROL STRATEGY – FOCUS ON THE BIG COST DRIVERS

Site / Retaining Walls

Structure

Envelope

Mechanical

Electrical







PRECON RESOURCES LIKE NO OTHER







EARLY VALUE ENGINEERING

No Last Minute Budget Fires

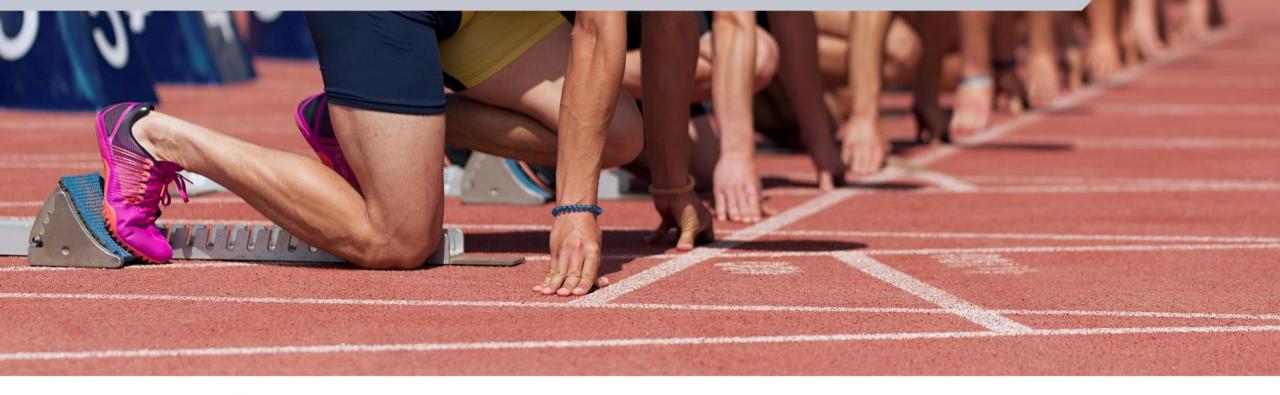






SUBCONTRACTOR COMPETITION

Prequalified & Ready to Start Pricing







Losing Behavior #9

NO FOLLOW UP ON WINS & LOSSES





Winning Behavior #9

DEBRIEFS THAT CREATE LEARNING & SENTIMENT





LOSING DEBRIEF QUESTIONS

Why did we lose?

What could we have done better?

What did the competition do that set them apart?

Did we bring the right team?

What should we do different going forward?





WINNING DEBRIEF QUESTIONS

Why did we win?

What could we have done better?

What did our competition do that resonated?

How close was the decision?





Losing Behavior #10

POOR PERFORMANCE





SYMPTOMS

Schedule Lapses

Change Order/Budget Overruns

Poor Quality

Litigation

Unhappy Clients





Winning Behavior #10







QUESTIONS?







WIN RATE **QUANTITY**

of wins

of pursuits

VOLUME

\$ of wins

\$ of pursuits







QUANTITY

VOLUME







THAT FUEL REVENUE GOALS

