



# Maximizing Choices and Mitigating Risks

Through Proper Communication,  
Branding, and Education

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RLI Design Professionals  
DPLE 183

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# Course Description



Strategize

Educate

Communicate

With a plethora of design firms nationwide, it is essential that firms set themselves apart in order to achieve valuable client relationships. This webinar reveals a few strategies that can help enhance your firm's public exposure and increase your firm's clientele.



# Learning Objectives

## Participants will learn:

- 1** Realize the importance of branding, communication, and educating the public effectively to relay information about your firm's services;
- 2** Consider ways in which to add impact through cross-selling, and increase the differentiation of your firm from the perspective of your potential customers;
- 3** Recognize and be able to assess the risk of not properly allocating time and money to developing your firm's unique identity; and
- 4** Study possible solutions to the low exposure, poor communication, and low-clientele problem.

# Selectivity

## Proper selection is key!

However...  
selectivity hinges on the  
availability of options.



# Case Study



## Scenario:

**The Client:** *Fast and Friendly Foods*, wants you to design a new restaurant. You've heard from a reliable source that they are nearly impossible to satisfy and you also have reason to believe they are in financial trouble. However, your firm is looking for new clients.

**The Team:** You find information about *Fast and Friendly's* preferred interior designer and contractor in the proposed contract. After researching both, you conclude they're successful, financially stable, well-run firms. You also had a great experience when you discussed matters with them over the phone.

## What should you do?

Go or No-Go



# Go/No-Go Analysis

Issue:	Risk Score:	Explanation:
<b>People</b>		
General Risk Assessment of Client/Owner Type		Clients who are inadequately financed, unethical, highly risk averse, in transition, or noncollaborative are all difficult to impossible to satisfy and thus higher risk
Knowledge of/Comfort Level with this specific Client/Owner		Working with repeat clients typically lessens the risk. If this is a new client, research important criteria like financial strength and litigation history
Availability of a Dedicated, Decisive Client Decision Maker		Clients may be impossible to satisfy and therefore higher risk if the decision maker is inexperienced, unavailable, indecisive, or changes during the project
Financial Evaluation of Other Team Members		Failure to work with financially strong and adequately-insured project team members puts your firm at risk of being the “deep pocket”
Overall Risk Assessment of the Project Team Members		Will the project team members be good business partners for the duration of this project and beyond?

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# Increase Your Opportunities

## Build up your clientele by:

- 1** Branding  
Brand your firm.
- 2** Communicating  
Communicate effectively.
- 3** Educating  
Educate potential clients.

# Branding

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# What Is Branding?

## Branding

The concept, idea, feeling, or image that comes to a client's mind when they think of your business.





# Strong vs. Weak Brands

To create a strong brand, customers must be able to connect with your services.

## Steps to creating a strong brand:

- ✓ Understand your audience
- ✓ Develop your story
- ✓ Stay consistent

# Questions To Consider

## Ask yourself:

What makes my firm different from other firms?

Who are my competitors, and what have they done?

What is my niche or specialty?

What would my brand look like if my brand was a person?

Who is my target audience?

# Target Both Old And New Clients

**Goal:** Keep a relationship with existing clients while seeking new clients

On average, firms that specialize in **Commercial** projects receive 78% of their business from repeat clients.

Firms that concentrate on **Institutional** projects receive 74% of their business from repeat clients.



# What Outlet(s) Should I Use?

## To reach your target audience:

Consider using a mix of both old and new marketing strategies.

Traditional outlets

Digital platforms

Ambassadors



# Ongoing Brand Maintenance

## Remember to:

- ✓ Continue to provide value
- ✓ Meet clients' expectations
- ✓ Form strong relationships with clients
- ✓ Stick to your firm's core principles





# Communicating Effectively

Branding alone will not suffice: you must also communicate well!

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# Effective Communication



“

Architects must be conscious in the realization that much of their target audience, current and prospective clients, have difficulty understanding the nuances of architectural language and the technicalities of architectural drawings.

Amanda Weko

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# Effective Communication In Design

## Why?

- 1** More often than not, clients pick firms that provide comprehensible information
- 2** Those involved in the potential project may not have the same level of education
- 3** Avoid getting sued

# Avoid Overselling Your Abilities

“It will exceed your expectations”  
“It is the best design possible”  
Other similar phrases...

Phrases to avoid

Don't offer  
assurances

Don't promise to exceed:

- The required standard of care
- “reasonable and ordinary care”



# Puffery Is Allowed But Not Advised

Clearly state and define your unique characteristics.

## Puffery:

An exaggerated statement that a reasonable or cynical person would not take seriously or as true, but whose purpose is to puff up the assertion.

\*Statements that can be measured and confirmed are **not** puffery.



# Avoid Deception

## Lanham Act § 43a(1)(B)

Any person who, on or in connection with any goods or services...  
uses in commerce any word, term, name, symbol, or device, or  
any combination thereof, or any false designation of origin, false or  
misleading description of fact, or misleading representation of fact, which -

...

(B) in commercial advertising or promotion, misrepresents the  
nature, characteristics, qualities, or geographic origin of his or  
her or another person's goods, services, or commercial activities

shall be liable in civil action by any person who believes the he or she is or  
is likely to be damaged by such act.

# FTC False Advertising Standard

## Truth-In-Advertising Laws State:

- 1** Advertising has to be both truthful and non-deceptive
- 2** Claims made in advertisements must be supported by evidence
- 3** Advertisements must be fair

# Avoid Violating Codes of Ethics

(American Institute of Architects)

## Rule 3.301

Members shall not intentionally or recklessly mislead existing or prospective clients about the results that can be achieved through the use of the Members' services, nor shall the Members state that they can achieve results by means that violate applicable law or this Code.

## Rule 4.103

Members speaking in their professional capacity shall not knowingly make false statements of material fact.

## Rule 4.201

Members shall not make misleading, deceptive, or false statements or claims about their professional qualifications, experience, or performance and shall accurately state the scope and nature of their responsibilities in connection with work for which they are claiming credit.

# Avoid Violating Codes of Ethics

(National Society of Professional Engineers)

## II. Rule of Practice

5. Engineers shall avoid deceptive acts.

a. Engineers shall not falsify their qualifications or permit misrepresentation of their or their associates' qualifications. They shall not misrepresent or exaggerate their responsibility in or for the subject matter of prior assignments. Brochures or other presentations incident to the solicitation of employment shall not misrepresent pertinent facts concerning employers, employees, associates, joint venturers, or past accomplishments.

## III. Professional Obligations

3. Engineers shall avoid all conduct or practice that deceives the public.



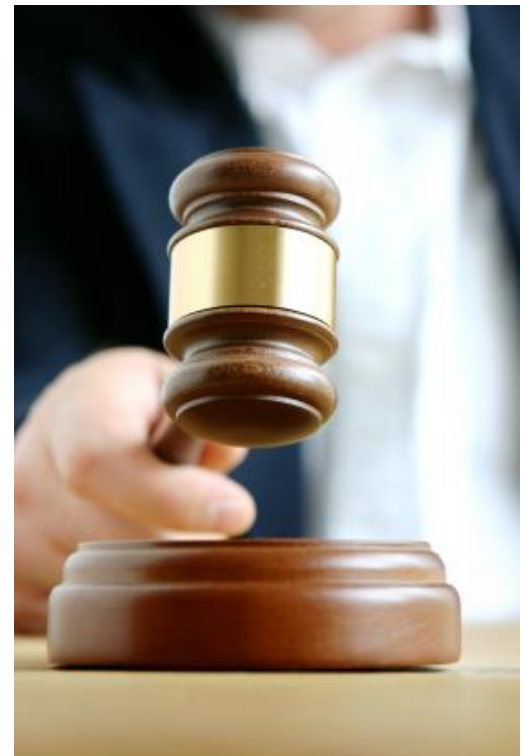
# Example of a Rule 4.201 Violation

## Scenario:

Architect A stated false, deceptive and misleading information about the firm's size, composition and the qualification of the employees at the firm when it made a presentation to a potential client.

**Findings:** National Ethics Council ruled the statements in the brochure were “blatant and intentional.”

**Penalty received:** Censure.



# Offer More Than What Is Expected

Offer the client more than they are expecting through effective cross-selling of your services.

It is not uncommon for you to believe that you have executed a perfect project, but the client is still unsatisfied!

Differentiate your firm and develop better relationships by trying to meet and exceed the needs that the client has defined.





# Educating

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# Why Must You Educate?

Find and connect with clients *before* they are ready to hire.

## The Client Demand Pyramid

Demonstrates the relationship between client phases and the offers clients are likely to respond to in a marketing campaign.

PHASES	OFFERS
Ready to hire (3%)	Hire!
Need advice (6%)	Diagnose
Idea gathering (91%)	Educate

“91% of the market isn’t ready to hire just yet.” However, you must find a way to target them.

# Education: What To Provide

## Things to Consider:

- ✓ Provide information that is usable and relatable
- ✓ Think about your audience
- ✓ Give examples of poor quality and great quality



# A Summary Of Solutions

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# Communication: FAB Model

Use the FAB Model to help your firm communicate more clearly and effectively.

## FAB Model:

- F** Features  
“facts or characteristics about your business, products and services.”
- A** Advantages  
“tend to be factual, and aren’t connected to a prospect’s need...yet.”
- B** Benefits  
“answer why someone would value the advantage.”

# Example: FAB Model

## Sample FAB Model:

**F** Features  
Our staff offers years of experience specializing in office designs.

**A** Advantages  
We can create tasteful and comfortable spaces for you.

**B** Benefits  
We enhance your business through our design.

# Provide Visuals

Provide visuals for better communication:

Virtual reality

Models

Diagrams





# Educate: What To Use?

Use the available tools effectively to build relationship – and trust – with potential clients.

Blogs

Tutorials

Podcasts





Thank you for your time!

# QUESTIONS?

This concludes The American Institute of Architects  
Continuing Education Systems Program

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