

SVTC



Silicon Valley Transit Consultants

1742 North First Street, Suite 400
San José, California 95112

**SVTC and VTA INVITE YOU TO A FREE ONLINE
MENTOR PROTÉGÉ ZOOM WORKSHOP #10**

**Business Development
in a
Hybrid Environment**

Thursday, March 10, 2022 - 12:00 p.m.

Presenter:

Sheila Wray Given, PGH Wong-Principal, Business Development



This program is an integral part of VTA's BART Phase II Project and is designed to help local, small and diversity-owned firms increase their capabilities to successfully compete for Government contracts.



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VTA Valley
Transportation
Authority
Solutions that move you

Strategic
Partnership

TRANSPORTATION BUSINESS DEVELOPMENT IN A HYBRID ENVIRONMENT

MARCH 10, 2022

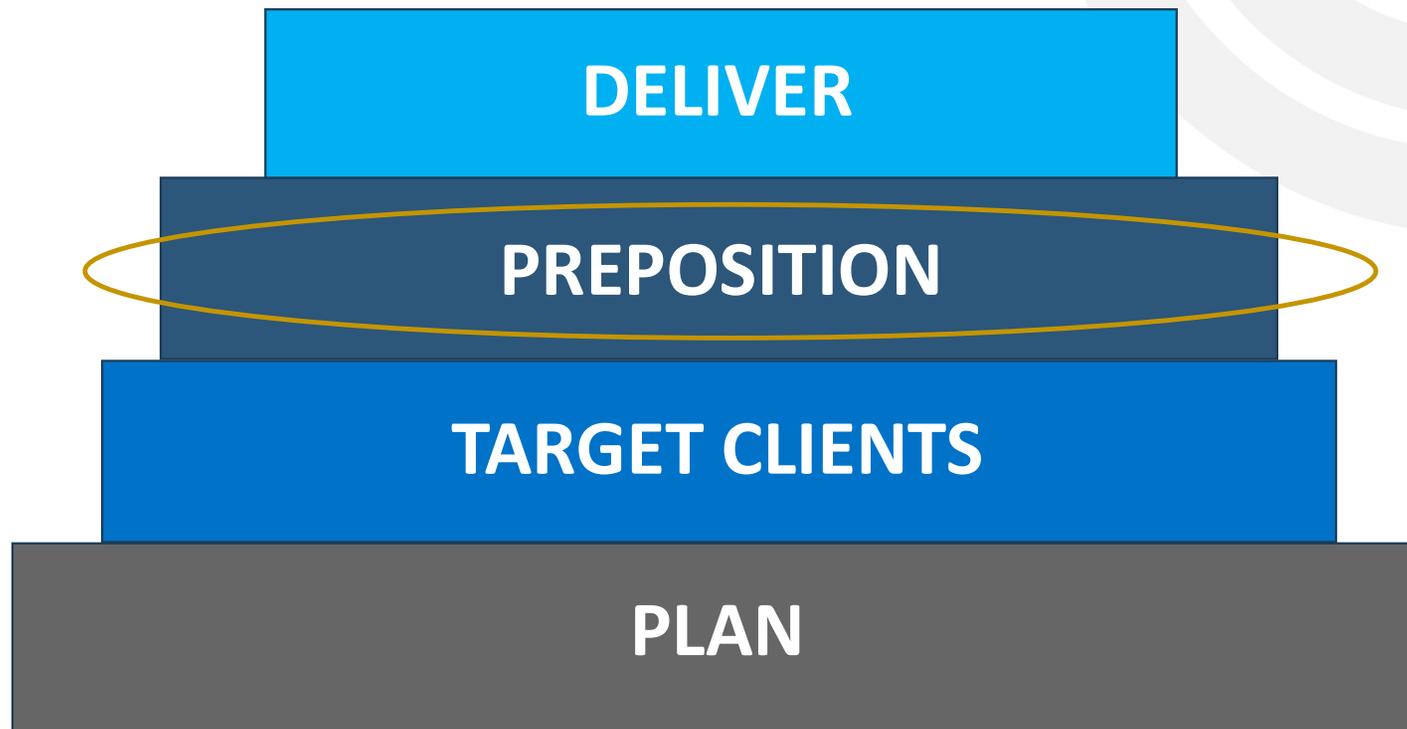


INTRODUCTION

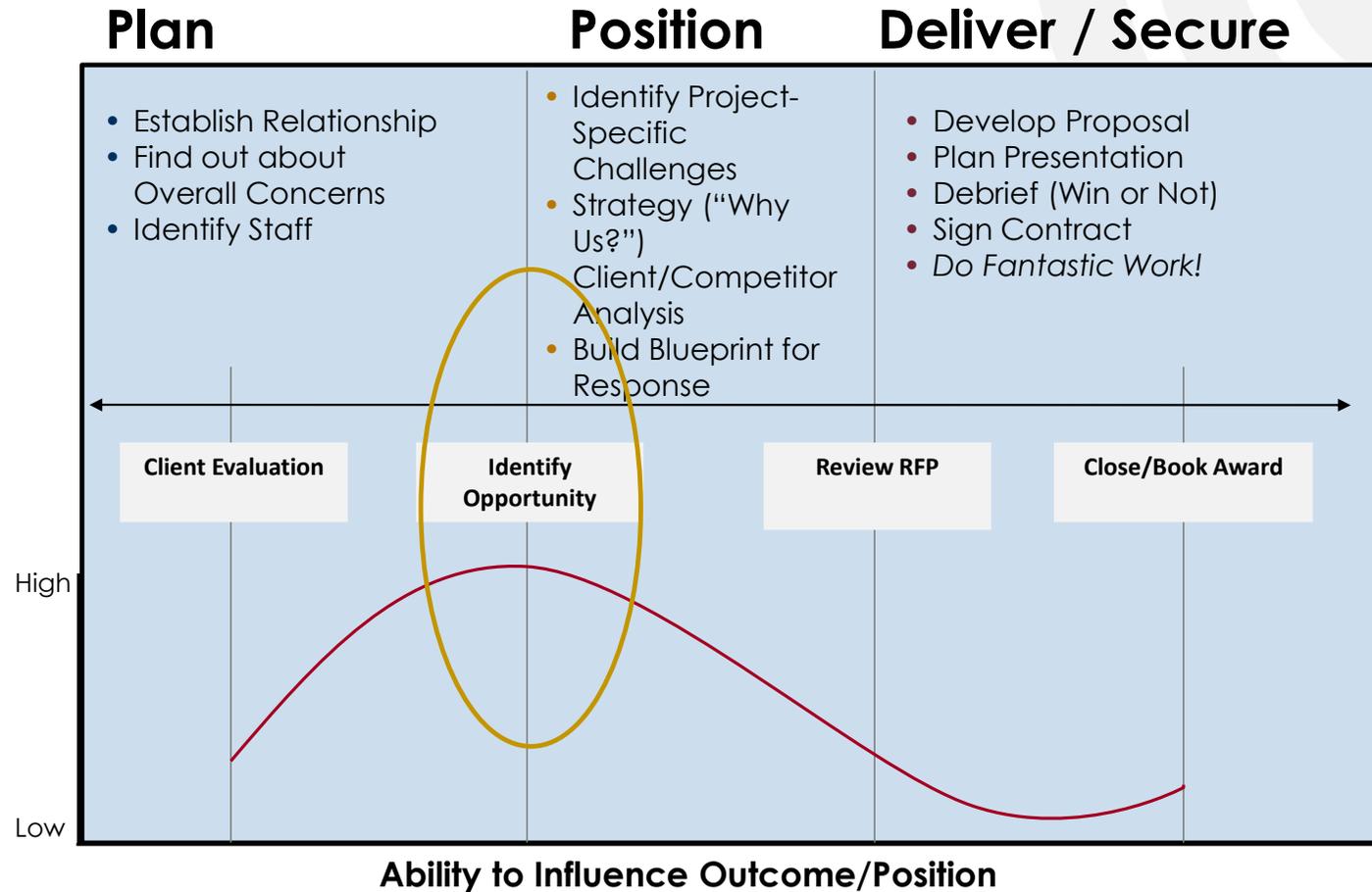
Business Development and its Purpose

- Ideas, initiatives, and activities to maintain and grow business
- Efforts to increase revenues and expand business operations
- Tasks that increase profits by building strategic partnerships and making strategic business decisions
- Act of identifying and developing opportunities for work
- Comprised of tasks and processes generally aimed at developing and implementing growth opportunities with and between organizations

THE BUILDING BLOCKS OF BUSINESS DEVELOPMENT



PREPOSITION - IMPORTANCE OF PLANNING AND TIMING



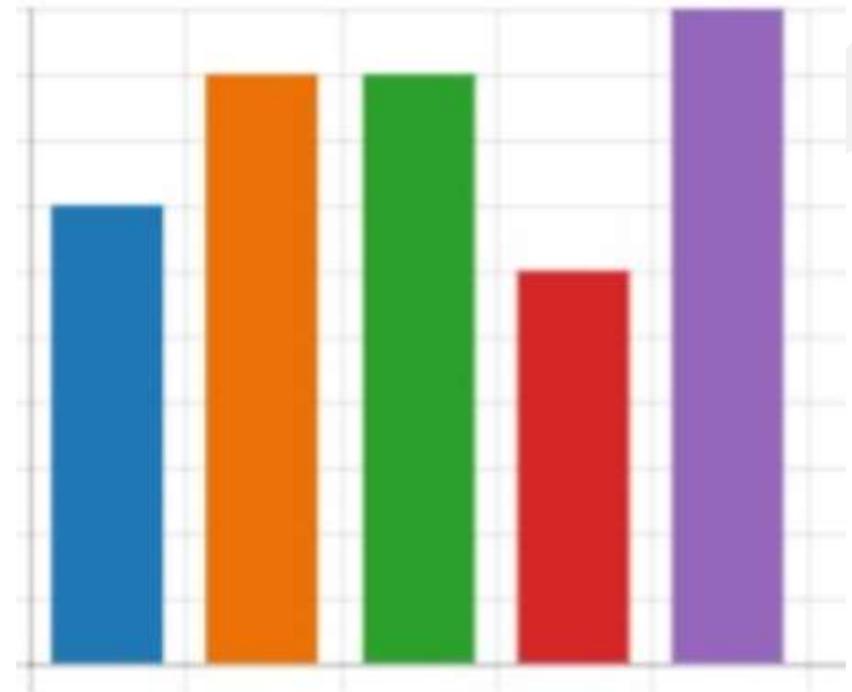
SURVEY SAYS



How have you and your firm conducted business development with your **current clients** during the last two years? **(CONSULTANTS)**

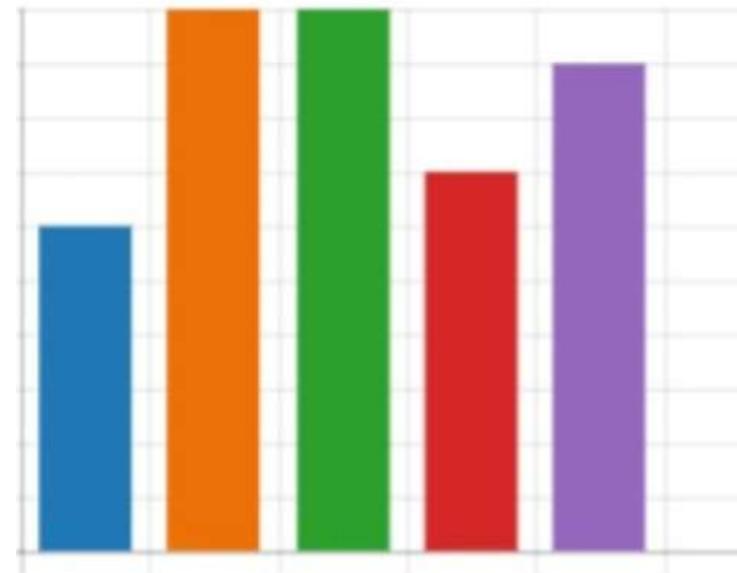
- 58% a. Conducted one-on-one (or ... Virtual/Video
- 75% b. Arranged one-on-one (or w... Phone Calls
- 75% c. Sent regular emails to stay i... Emails
- 50% d. Met for one-on-one meetin... Met Outside
- 83% e. Participated in virtual indust... Virtual Events

Virtual Industry Events Highest Used BD Element by Consultants with Current Clients



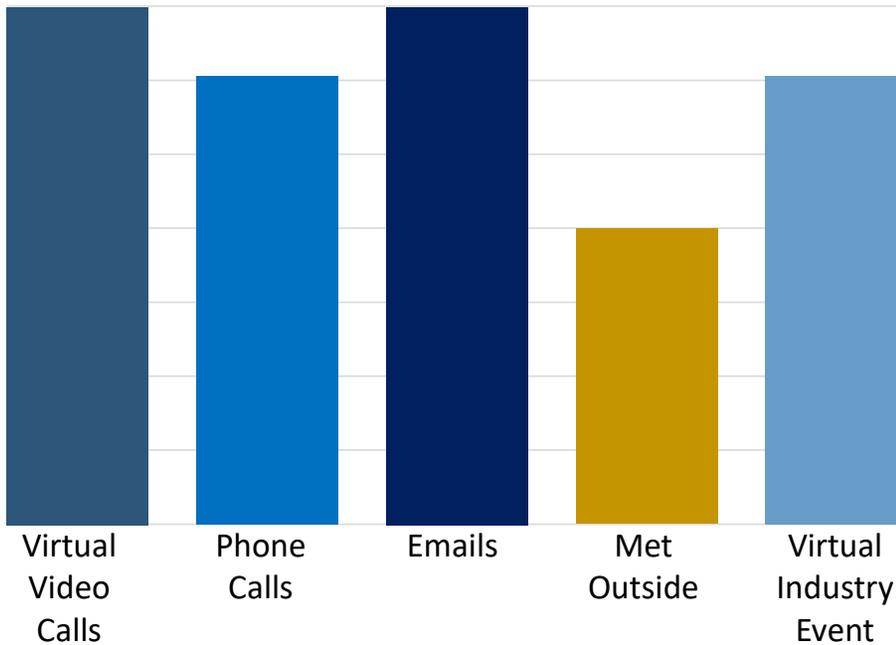
How have you and your firm conducted business development with your *potential clients* during the last two years? **(CONSULTANTS)**

- 50% a. Conducted one-on-one (or ... Virtual/Video
- 83% b. Arranged one-on-one (or w... Phone Calls
- 83% c. Sent regular emails to stay i... Emails
- 58% d. Met for one-on-one meetin... Met Outside
- 75% e. Participated in virtual indust... Virtual Events



Phone Calls & Emails Highest Used BD Element by Consultants for *Potential Clients*

How have your current & *potential* consultants conducted business development with your during the last two years? (CLIENTS)



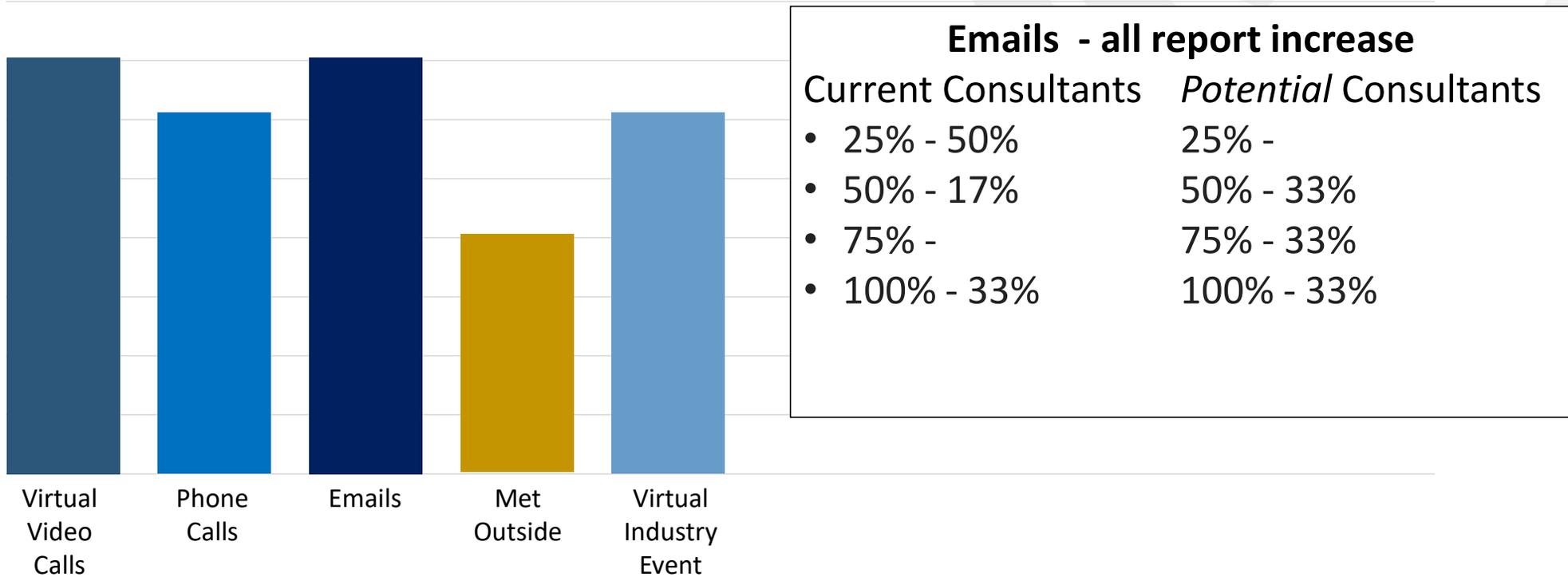
Virtual Video Calls - all report increase

Current Consultants	Potential Consultants
• 25% - 14%	25% - 20%
• 50% -	50% - 40%
• 75% - 14%	75% - 40%
• 100% - 71%	100% -

Virtual Video Calls and Emails tied for Highest Use as reported by Clients



How have your current & *potential* consultants conducted business development with you during the last two years? (CLIENTS)

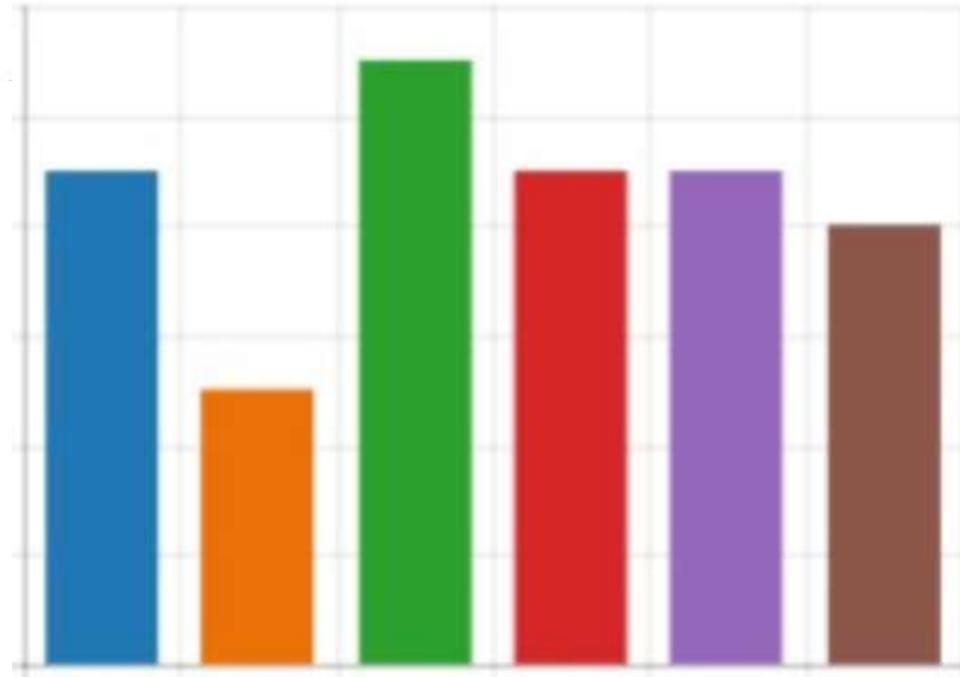


Virtual Calls and Emails tied for Highest Use as reported by Clients



How did you stay knowledgeable about possible pursuits with your **current clients** during the last two years? **(CONSULTANTS)**

- a. Reviewed agency websites 75%
- b. Watched virtual agency boa... 42%
- c. Participated in virtual pre-pr... 92%
- d. Took part in consultant com... 75%
- e. Participated in industry org... 75%
- f. Asked a colleague for the inf... 67%

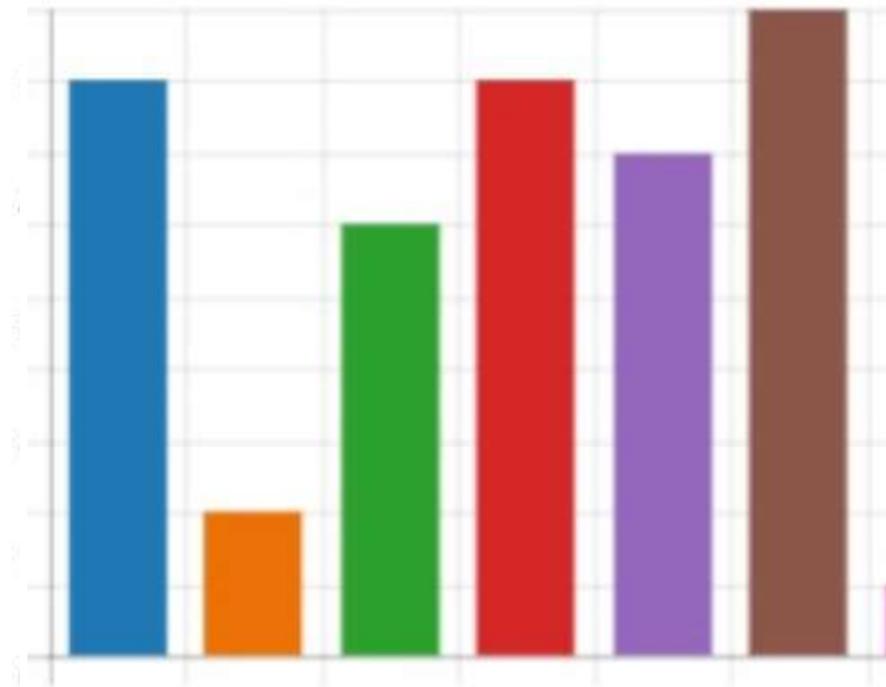


Virtual Pre Proposal Conferences for Specific Pursuits Highest Used BD Element by Consultants with Current Clients



How did you identify your *potential clients* during the last two years? (CONSULTANTS)

- a. Reviewed agency websites 67%
- b. Watched virtual agency boa... 17%
- c. Participated in virtual pre pr... 50%
- d. Took part in consultant com... 67%
- e. Participated in industry org... 58%
- f. Asked a colleague for the inf... 75%

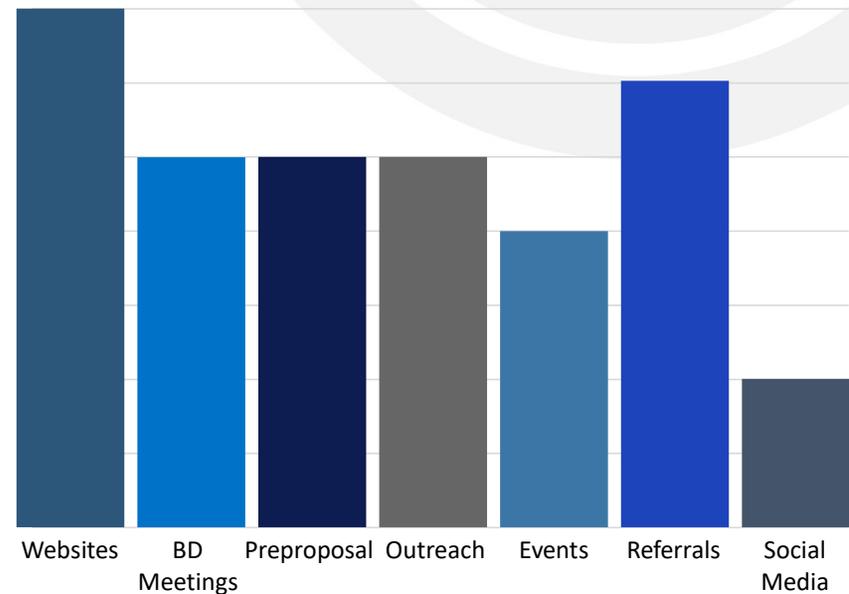


Referrals were the Highest Used BD Element by Consultants to identify *Potential Clients*

HOW DID YOU ENCOURAGE CONSULTANTS TO STAY KNOWLEDGEABLE ABOUT POSSIBLE PURSUITS (CLIENTS)

**#1 Agency Websites
followed by #2 Referrals**

1. **Agency websites including an upcoming contracts list**
2. Virtual agency board/committee meetings
3. Virtual pre-proposal conferences for specific pursuits
4. Virtual outreach sessions for general and specific pursuits (hosted by agencies and consultants alike)
5. Virtual Industry organization events/programs
6. **Referrals to others in an agency or firm**
7. Social Media / News



What did you find was your biggest challenge with either current or potential clients? (CONSULTANTS)

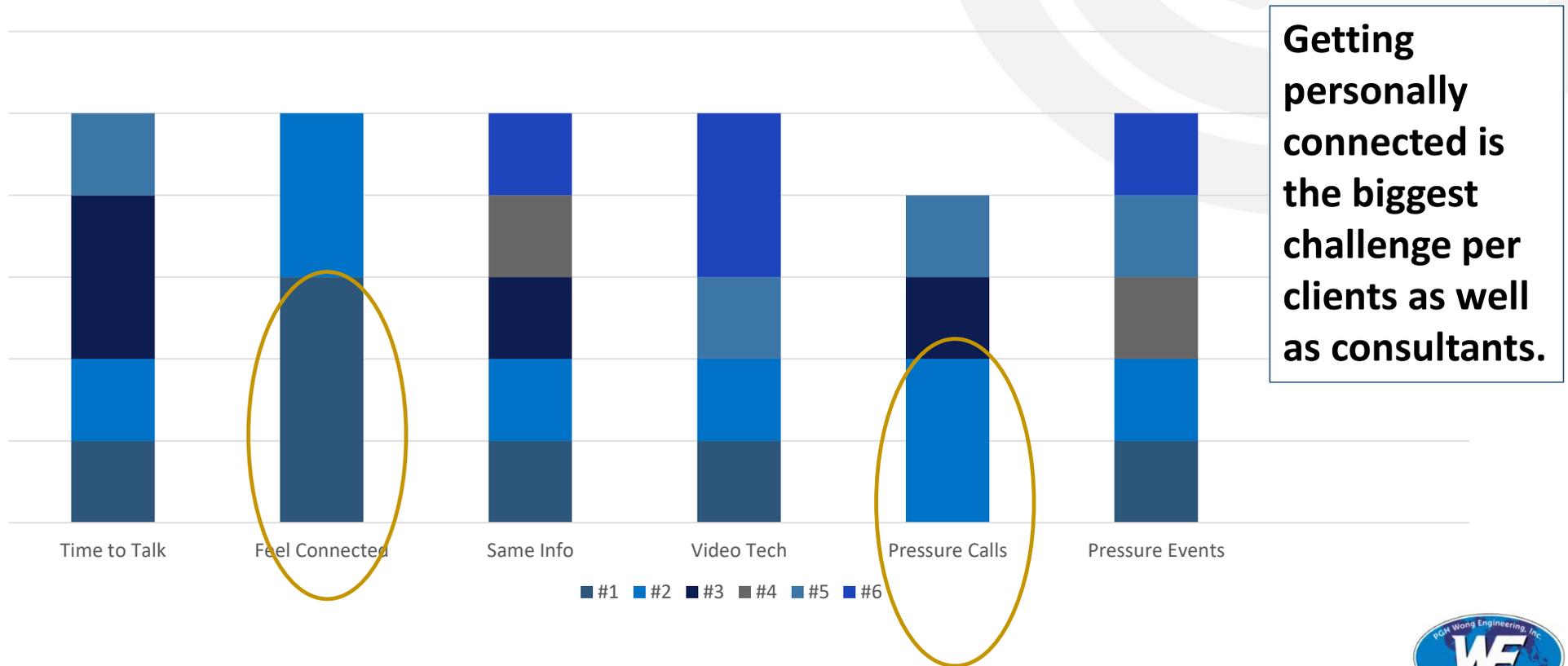
1 2 3 4 5 6

- a. Finding out who to talk to at the agency or company
- b. Setting up a time to talk with agency or company
- c. Getting personally connected
- d. Obtaining the same amount of information as in face-to-face meetings
- e. Meeting others - or leveraging meeting to know who else to talk with at the agency or company
- f. Monitoring ever-changing RFP release dates and deadlines
- g. Other



Getting personally connected is the biggest challenge per consultants, followed by setting up times to talk

WHAT DID YOU FIND WAS YOUR BIGGEST CHALLENGE WITH CONSULTANT BUSINESS DEVELOPMENT? (CLIENTS)



What have you found to be your biggest successes or benefits with either current or potential clients? (CONSULTANTS)

1 2 3 4 5

a. Time savings as no commutes

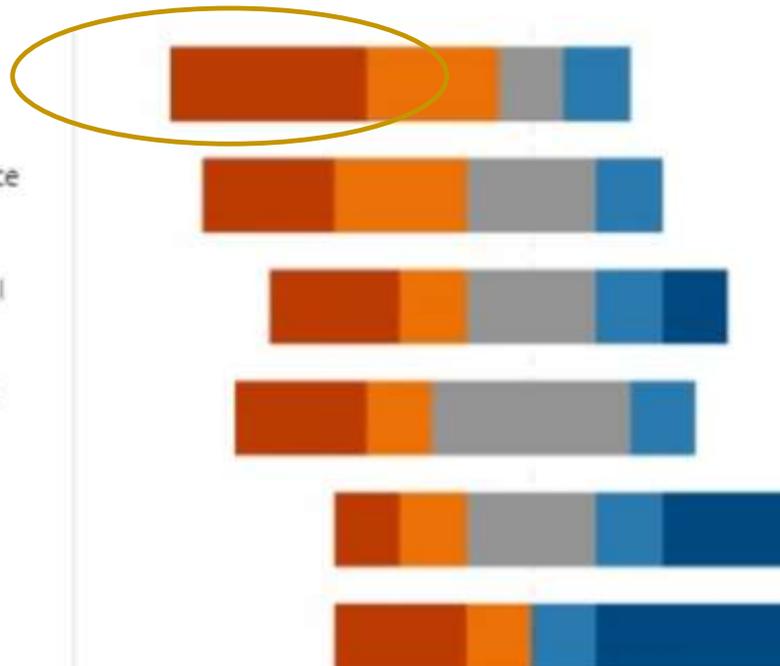
b. Business development savings with no face-to-face meetings or programs

c. Found you could personally connect nearly as well as face-to-face to meetings and programs

d. Discovered through various means you could get more information with less time involved

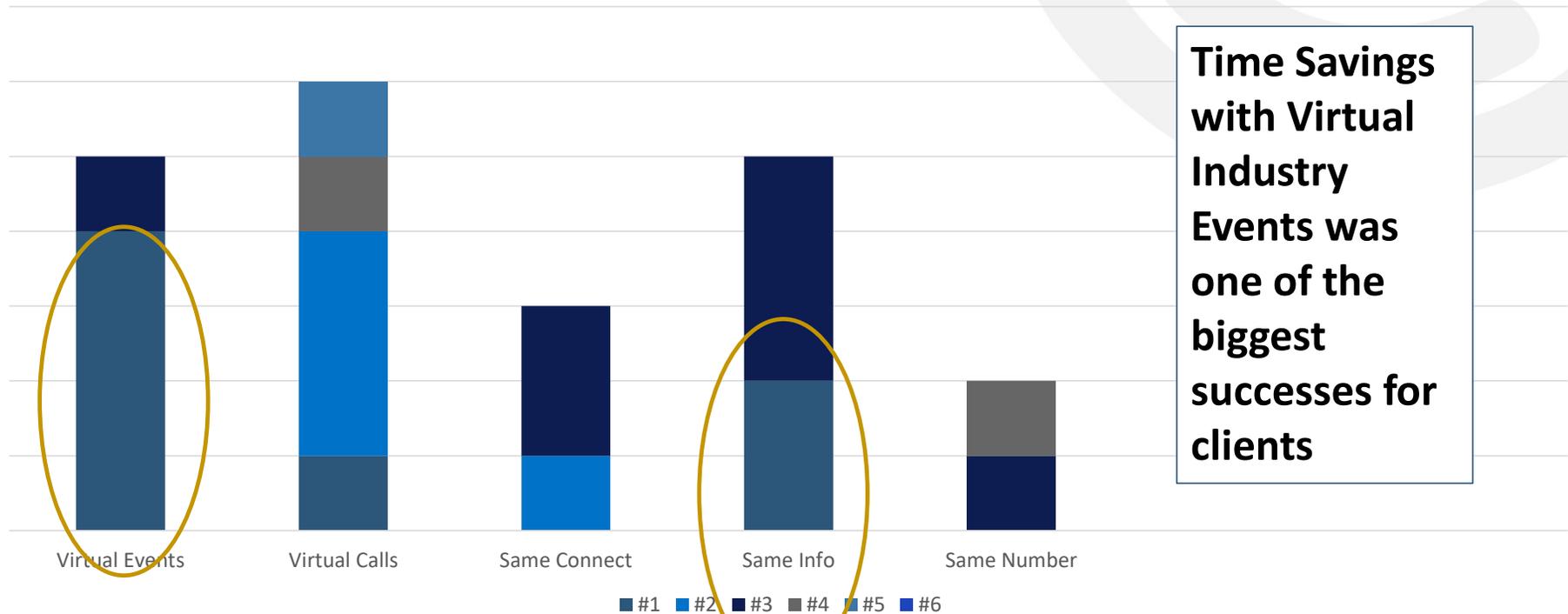
e. Leveraged new relationships by asking current colleagues to recommend or introducing you via...

f. Other



Time savings biggest success per consultants, followed by overall BD savings

WHAT DID YOU FIND WAS YOUR BIGGEST SUCCESS WITH CONSULTANT BUSINESS DEVELOPMENT? (CLIENTS)



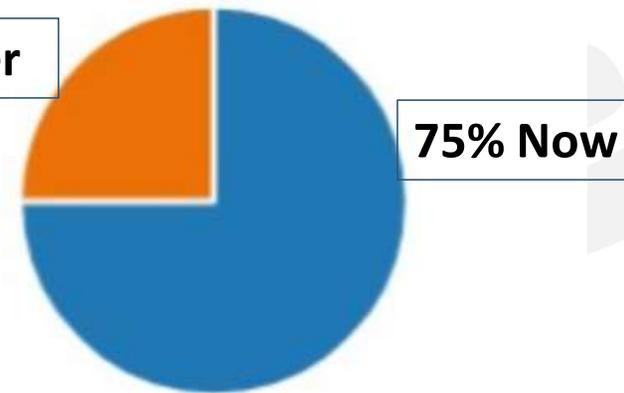
Time Savings with Virtual Industry Events was one of the biggest successes for clients



WHEN WILL STAFF PERFORMING BD FEEL COMFORTABLE GOING BACK TO FACE-TO-FACE MEETINGS? (CONSULTANTS)

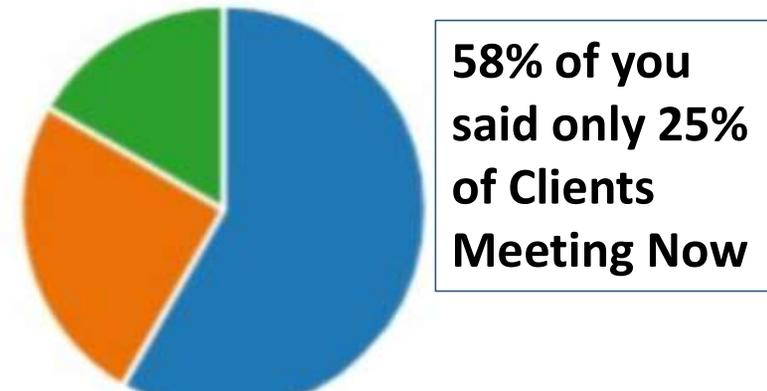
● a. Now	75%
● b. Summer	25%
● c. Fall	0
● d. 2023	0

25% Summer

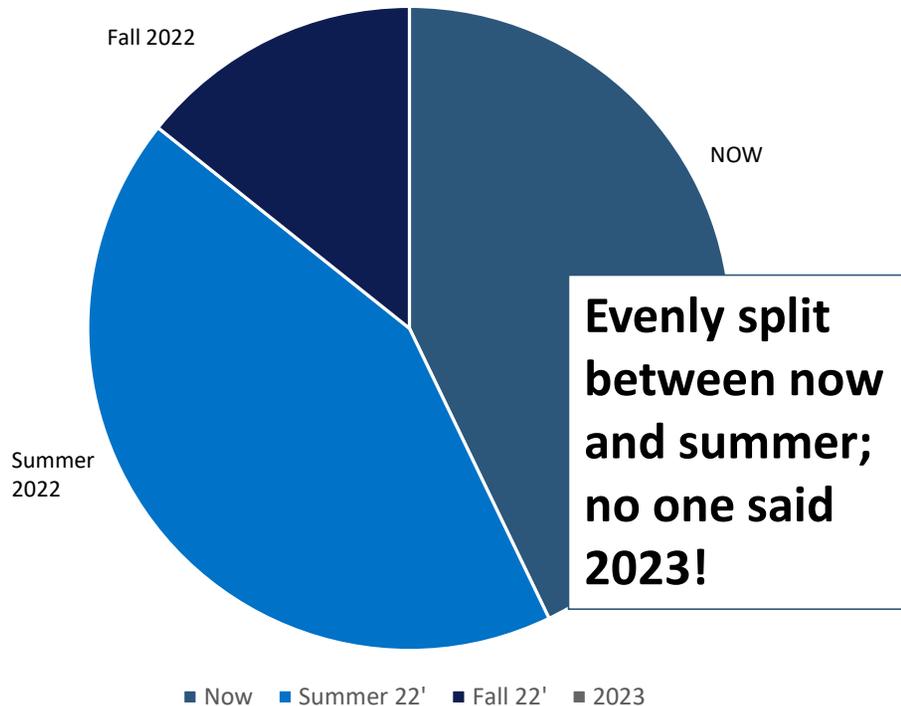


HOW MANY OF YOUR CLIENTS ARE MEETING FACE-TO-FACE NOW? (CONSULTANTS)

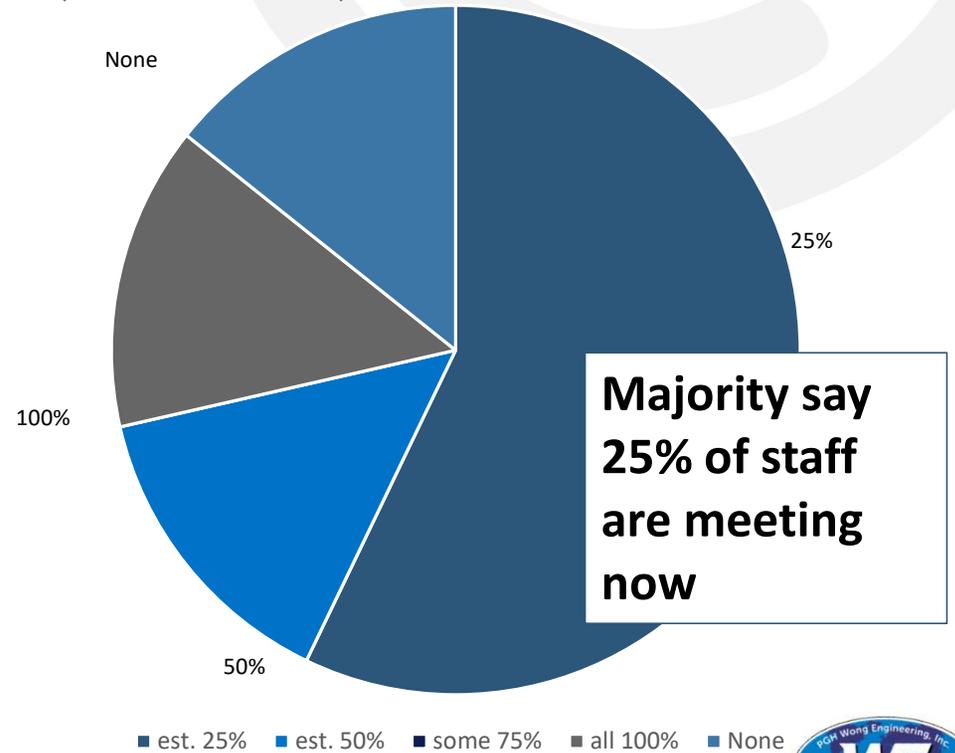
● a. A few (up to 25%)	58%
● b. About half (50%)	25%
● c. Nearly all (75%)	17%
● d. All (100%)	0



WHEN WILL YOU FEEL COMFORTABLE GOING BACK TO FACE-TO-FACE MEETINGS: (CLIENTS)



WHAT PERCENTAGE OF YOUR STAFF ARE MEETING FACE-TO-FACE NOW: (CLIENTS)



15. How many of your clients do you think will go back to a nearly all face-to-face business development process or similar to pre COVID?

[More Details](#)

 a. A few (up to 25%)	17%
 b. About half (50%)	34%
 c. Nearly all (75%)	42%
 d. All (100%)	1%



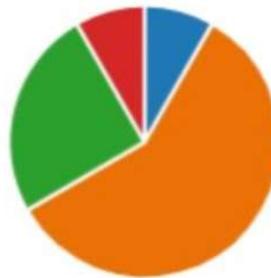
42% of you forecast that 75% of your clients will go back to a nearly all face-to-face strategy

(CONSULTANTS)

16. How many of your clients do you think will embrace more of a hybrid business development process? (virtual calls, pre proposal conferences, and events/programs; face-to-face meetings, among other tools).

[More Details](#)

 a. A few (up to 25%)	1%
 b. About half (50%)	58%
 c. Nearly all (75%)	25%
 d. All (100%)	1%

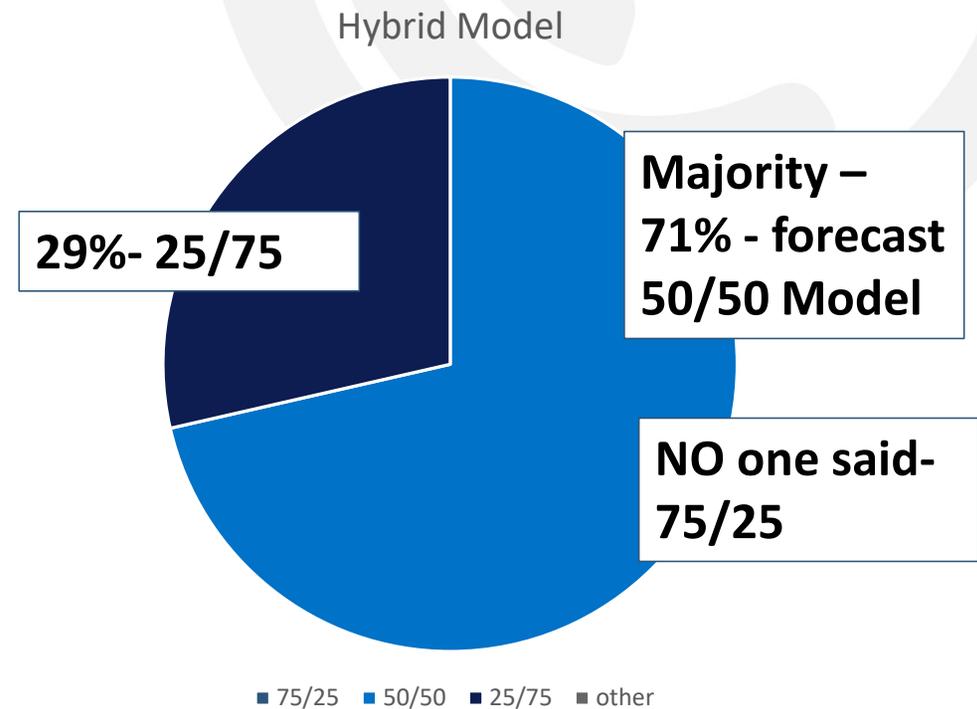


(CONSULTANTS)

58% of you forecast your clients will embrace a hybrid BD process

HYBRID BUSINESS DEVELOPMENT: (CLIENTS)

1. 75/25 approach – 75% in person including one-on-one meetings and industry events and 25% virtual (of your total business development time)
2. 50/50 approach – 50% in person and 50% virtual
3. 25/75 approach – 25% in person and 75% virtual
4. Other –



TRENDS NOTED BY SURVEY OUTCOMES

1. Industry Events
2. Combination of Virtual Video Calls, Phone calls and Emails
3. Pre Proposal Conferences will remain a key BD tool
4. Referrals, Outreach Events and Agency website key in Potential Clients
5. Most Clients are leaning toward a 50/50 hybrid model
 - Potentially fewer in person meetings – so be very prepared



TIPS: SURVEY SAYS (CLIENTS)

Last Question on the Client Survey:

“Knowing A/E/CM is a people business and the importance of relationship building, what would you more like to see consultants doing more of going forward in this hybrid environment and/or just in general in their conducting business development with you and your agency?”

TIPS: SURVEY SAYS (CLIENTS)

Answers from the Client Reps:

- *“Ask client preferences for meet/greets and remain flexible (virtual or no).”*
- *“If the meeting is virtual, email company materials and try to introduce teams differently. Discuss more about who you are, company culture, maybe personal career journeys, etc.”*
- *“Suggest outdoor/off-site meetings if allowable (as alternative to virtual)”*
- *“Set up virtual meetings.”*
- *“Be proactive.”*

TIPS: SURVEY SAYS (CLIENTS)

Answers – continued:

- *“Get more knowledgeable about the procurement process.”*
- *“Bringing some solutions to clients even during business development.”*
- *“Do their homework before coming to clients. We have very limited time to go over details.”*
- *“Meet and greets ... too often... are a waste of time – everyone comes in saying how great their business is. It would be good if they could come in having some knowledge of our business and how they specifically could help us or identify a problem they could solve or introduce a new technology we aren’t using.”*
- *“E-mails with newsletters on company updates on projects you are working on would be helpful.”*



TIPS ON PREPARING FOR A CLIENT MEETING



OVERVIEW OF EFFECTIVE CLIENT MEETINGS

1. **Validate Past Research – Project still Key to your Plan?**
2. **Prepare for Client Meeting**
 - ✓ Set meeting objective/agenda
 - ✓ Request meeting w/objective, date/time and *preferred* format
 - ✓ Prepare priority questions
 - ✓ Tailor appropriate company materials
 - ✓ Gather information & build relationship
3. **Post Meeting**
 - ✓ Document meetings for files and actions

“If you have no meeting objectives, you’re just a well paid tourist.”

WRAP UP



WRAP UP - ACTIONS

Bring strategy to your business development. Lay the groundwork, evolve your processes, and make a concerted effort to provide VALUE. Lastly, be flexible and not only evolve with the changes but also thrive!

- What's one thing I can do tomorrow to increase the effectiveness of my client meetings?
- Name at least two people to help you do it.
- Just do it!



WRAP UP - BE VISIONARY

“It is not the strongest of the species that survive nor the most intelligent, but the one most responsive to change.”

- Charles Darwin

“Change is the law of life. And those who look only to the past and present are certain to miss the future.

- John F. Kennedy

“Change is inevitable. Growth is optional.”

-John C. Maxwell





THANK YOU!



sgiven@pghwong.com



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