



Case study: Planning consultancy fires-up their business development

Barton Willmore is the UK's leading independent planning and design consultancy. Ambitious to grow but at times frustrated by a lack of structure and focus in their business development and subsequent marketing, they found this gap was hampering their plans to grow and make the most of their multi-office, multi-disciplinary practice.

Business development was not part of their fee-earners' every day activity, and not enough people were involved in activities that would help both raise the firm's profile and develop relationships with potential clients. There was also a tendency for existing activity to be scattergun and operating in silos, without fitting into the bigger picture.

As Jenni Montgomery, Business Development Director explains, "We are a well-established and respected business, but we knew that without engaging our associates and directors in a very practical way, and proactively overcoming the hurdles that existed, we weren't going to be able to support efforts to grow the business."

The plan we put in place

We ran a practical, interactive workshop, and supported delegates in actioning their plans. This:

- Helped delegates to be more confident in business development



"The workshop Rachael runs has given us the increased levels of BD activity and success we have today."



- Changed their attitude so as to be more engaged in marketing and BD activities
- Guided them in how to best use a sales planning approach which pinpointed where to spend their time and resources on the things that would make the most difference
- Gave them a practical plan to go away and action
- Introduced them to a best practice skills and processes, helping them to win more of the type of work they want from the clients they want to work with

The first step was to speak in more depth to senior people in the business, who were our champions. We wanted to gain a better understanding of the firm, their plans and aspirations and some of the current challenges. A good deal of thought was put into what we wanted to achieve, what we wanted participants to do, how we would engage them before and during the day and, crucially, how we could support them after the workshop, to make sure things happened.

With this agreed, we launched a pilot workshop. Using a model from The PACE Partners (a BD consultancy specialising in professional services firms) as the starting point, the workshop included practical exercises linked directly to their work. Delegates each went away with a draft sales plan that they could start implementing immediately.

The workshop was refined over time. After each session, we talked about feedback and possible changes and improvements to make sure that it continued to be valuable and have an impact. An early conclusion was that it was essential to have a partner on the first few workshops to introduce it, put it in the context of the wider business plan and to demonstrate that there was senior support.

"It's the practical take-aways from the day that make the difference"

What they take away from the workshops is:

- Knowledge of how to use the pipeline model to structure, focus and drive their activities, and where they need to spend more (or less) time to make it work for them
- An understanding of what marketing materials and support was available from Jenni and her team that could support their activity and specifically how they could be used
- Where the gaps were in marketing content and what they needed to do to fill them



Lovely quote here in Museo 500 in 12pt, spacing in 1.1. What we didn't want was a lofty strategy document that meant nothing in practice.



Key project outcomes:

- Delegates more confident in business development
- More engagement with marketing and BD activities
- Guided sales planning pinpointing where to spend time
- Practical actions they could implement immediately

- A draft content-led campaign to approach specific prospects with a view to getting an initial meeting
- A plan of how to cross-sell to one client where they'd identified there being an opportunity (a plan they can then replicate with other clients)

Jenni Montgomery reflects: "One of the key things to come out of the first few workshops was the idea that we needed to put in place a more formal plan for each person to help them action what they'd discussed and committed to on the day."

"What helped us to change was: making BD more visible, making connections, different attitudes and an outside view."

And so she developed the idea of individual business plans for each delegate. Over time, these have become a core part of the way they work and a key way in which their BD activity can be focused, recorded and measured. In fact, everyone in the firm above a certain level has to have one now, often agreed before they go on the workshop, and refined during the day.

There are two other important things which have come out of the workshops:

Cross-selling: As a result of the workshops, Barton Willmore have seen much more cross-selling happening. The prevailing attitude, spoken by a recent delegate, is now: "I don't understand why you wouldn't". Compare this to five years ago when it was sometimes a struggle to identify cross-selling opportunities.

Spotting and developing opportunities: There are numerous examples of how being on the course has helped staff spot and develop opportunities. One of the delegates on the last workshop shared how he'd used what he'd learnt with a couple of recent prospects, out of which has come two large projects.

The breakthroughs – what helped change to happen

There were a few things that helped to facilitate change within the firm:

- **Visibility:** Because Jenni attended each course and because we ask people to share what activities they were undertaking at the moment and where they felt the opportunities were, there was much greater shared visibility of BD generally and what specifically was going on.
- **Connections:** Many of those from different offices had never met each other, so the fact that they are attending the course together means that they can make connections, learn from each other and see sight of the bigger picture and how their office fits into the overall firm plan. It has also helped with referring work across offices since it's been a chance for



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What helped change to happen:

- Shared visibility of business development
- Connections internally
- More positive attitude to marketing and business development
- Outside and expert view

people to understand in more depth other specialisms offered by the firm.

- **Attitude:** Over time, the course has helped to change people's attitude to marketing and BD. They now appreciate the need to spend time on both aspects and know what contribution they can make.
- **Outside and expert view:** One of the biggest benefits has been someone outside the firm providing an expert view and being able to challenge internal opinions. Sometimes it's difficult for someone in the firm to do this, and if they do they aren't always heard. An outside voice has also provided a different perspective – and information about how other firms are successful in marketing and business development.

"One of the things we have now is a common BD language", Jenny Montgomery said. "When I talk about their pipeline or the various elements of it, most people know what I'm talking about. It's played an important part in framing our conversations and directing our efforts."

Some important internal changes have also been made, notably to financial reporting so that not only income but internal referrals are measured. These changes can be crucial to underpin the on-going value of the workshop.

What happens after the workshop

Jenni is clear about her role in the firm. "I'm here to support and enable the fee-earners. Our marketing is driven by conscious BD; it needs to have a purpose and support BD activities." The key now is to make sure BD remains a priority for fee-earners and that their successes are as visible as possible and referrals and cross-selling are encouraged and congratulated.

Equally important is supporting the fee-earners on an on-going basis with their personal plans – regular meetings to discuss progress, help them overcome hurdles and just-in-time coaching to support specific activities.

In reflecting on the relationship, Jenni comments: "Rachael and the workshop she's developed and run has played an important role in changing our approach to BD and marketing. The work over the last few years has created the structure and focus we didn't have before and has been instrumental in generating the increased levels of BD activity and success we have today."



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