



Guest Speaker: Don't lose sight of lessons learned. Planning for 2009 includes a reflection upon this year's lessons.

By Anne Scarlett, printed in *The Zweig A/E Marketing Letter*

It's Fall — time for savvy firms to gear up for 2009 strategic planning, followed by the development of tactical action steps. In marketing, we begin by collecting data on competitive positioning, hit rates, returns on marketing investment, trends of target markets, client feedback. This data feeds into the planning session, resulting in an informed, forward-thinking outcome. Yet, within this data, where are lessons learned from the current year? In my own consulting practice, I revisit my list of lessons once I begin developing tactical steps.

Lessons come from experiences where you learned something new—not necessarily from blatant mistakes. I encourage you to share your firm's lessons with other non-competing colleagues in our business. In the spirit of co-learning, I offer my own top three 2008 lessons:

LESSON 1: IT'S OK FOR YOUR FIRST OPTION TO BECOME YOUR FIRST CHOICE.

Story: A client hired me to recruit their new marketing director. The firm—and job description—was unusual. I anticipated that it could take months to secure the right person. Yet, by a stroke of luck and good timing, I came across an exceptional candidate just two days after the search commenced. She seemed ideal, and I was thrilled to introduce her to my client for consideration. He, too, was impressed by the candidate's credentials, personality, and aspirations. I couldn't think of any reason not to hire her. I created an evaluation matrix. I checked every reference. On the one hand, I felt as though I was doing my client a disservice if I did not search further for additional candidates. Yet, this one felt 'right' to all of us. Ultimately, I accepted that once you find a gem 'solution', go ahead with due diligence regarding its value, and then take it! Don't waste time searching for something better when you've already found the best. The same holds true when you have a brilliant marketing idea. Let's say you are creating a new marketing campaign theme. The first idea tossed out is incredible. You continue brainstorming for hours, but ultimately, everyone returns to that first idea. Don't feel short-changed. Most times, you'll generate umpteen ideas before you reach the right one, so why not take joy during those rare times when it appears quickly?

LESSON 2: DON'T BE SHY ABOUT CO-OPTING EVERY POSSIBLE DECISION-MAKER.

Story: After hearing me speak at a conference this past winter, a senior marketing partner from a construction firm requested that I submit a proposal to assess his firm's ability to shift from geographic divisions into market sectors. I spent much time scoping out the work, and carefully considered the deliverables and fee. My impression was that he, as a partner, would be empowered to approve this engagement without additional approval. While it was implied, I never verified my assumption. The day the contract was to be signed and sent with an installment check, is the same day that my contact told me his news: the CEO had just hired a large consulting firm for a similar, thus redundant, scope of services. Not only was the CEO not aware of my discussions with this partner, but he also had not communicated his own independent pursuit for a consultant. Had I been wise, I would have inquired further about decision-making process, and I would have insisted on the inclusion of all decision makers prior to my proposal preparation. Often, we strive to remain respectful of our primary contact, and we hope they will be open about their decision process: players, timing, deal-breakers. We hesitate to ask our contacts—especially those that hold senior positions—this question: 'Is there anyone else we should include in our conversation?' Shame on me for not executing this very basic step to gain complete clarity before wasting valuable time and energy!

LESSON 3: WHEN SUGGESTING CHANGE, MAKE SURE TO EASE YOUR AUDIENCE INTO IT.

Story: I was invited to meet with the senior team of a large engineering firm. They sought a consultant to create a sales training system for senior technical staff. During our first meeting, I learned about the firm's culture thanks to all of the environmental cues. By the second meeting, I had formed an approach that would include some alternative, confidence-building exercises that would greatly help in participants' growth. I planned to appeal to their humanistic sides, and would uncover internal self-motivators and latent talents within each person. Based on the firm's culture, I knew these folks would not be immediately receptive to this approach, and that it would require slow emergence. Yet, when it came time to present, enthusiasm overcame me. I blurted out my ideas, which sounded foreign to them. Without framing it in the proper context, it was too late. They felt that my approach would not appeal to older, conventional, all-male engineers. While I am certain that I would have made great breakthroughs to elevate their selling success, I also realize that I needed to be more strategic in my presentation of this alternative approach so that it would be palatable to, and embraced by, my audience.

When doing tactical planning for the upcoming year, don't lose sight of prior lessons learned. Yours may be as random as the ones I have cited, yet when organized into themes they can be very helpful as you move towards a successful 2009.