

Forward Velocity Webinar

Presented by Full Sail Partners



Agenda

1. **WebEx Instructions**
2. **News & Calendar of Events**
3. **Presentation**
 1. Video Introduction
 2. Impact of Social Media
 3. Panel Introductions
 4. Audience Questions
 5. Moderator Questions
4. **Marketing Metrics**



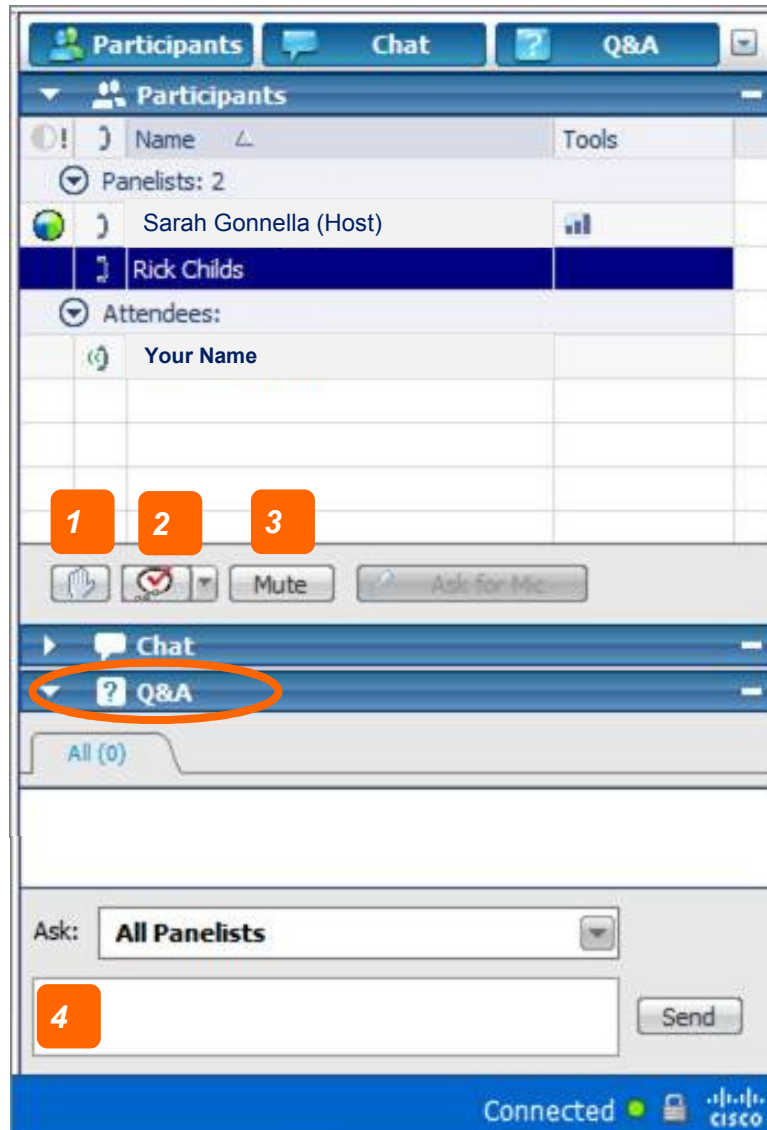
WebEx Instructions

Instructions:

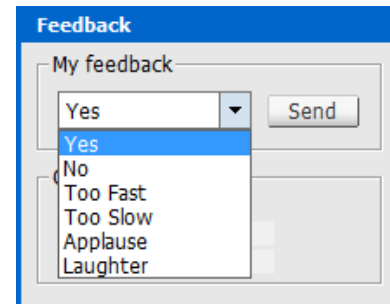
- 1. Call 1-650-479-3207**, you will be prompted to enter the meeting number, you will then be prompted to enter your attendee number, **please wait until the you have heard all of the instructions before entering your attendee number.** The meeting number and your attendee number can be found on the **info tab** of the WebEx Event Center screen.
- 2. All lines are muted upon entry into the call.**
- 3. Once you have called into the meeting, please make sure you have the phone handset symbol next to your name in the WebEx Event Center screen, Participant Panel under Attendees.** If you do not have the symbol, please hang up and call back (you do not need to exit the meeting to do so). Make sure you enter the correct attendee number when calling in, this will allow us to unmute your line should you want to ask a question during the meeting. If you are using VIOP we will not be able to unmute your line.
- 4. Event materials are available to download for this meeting.** You can find the materials on the Web Event log in screen on the left hand side under “Event Materials”. Please be sure to download the materials for the meeting.
- 5. If you did not download the materials, you can go back to the meeting invite email you received, click on the link to log into the meeting, download the documents and close the screen.**
- 6. If you did not download the materials, you can go back to the meeting invite email you received, click on the link to log into the meeting, download the documents and close the screen.**



WebEx Instructions



1. **Raise Hand** (be sure to click again to remove raised hand or feedback information)
2. **Feedback Tool** (use for yes/no questions or to provide the speaker feedback).



3. **Mute** (mute yourself when you need to talk to someone in your office or put the line on hold)
4. **Q&A** (Type in the Q&A dialogue box [Not Chat] to ask a question. Be sure to choose All Panelist)



News & Calendar of Events

Maximize. Grow. Plan. Evaluate.

Our Forward Velocity webinars are focused on topics to move your firm ahead of the competition and provide insight on how to take action at a rapid speed. Be in action with your business and reach full sail!

Yearly Schedule:

Maximize | January, February, March

Grow | April, May, June

Plan | July, August, September

Evaluate | October, November, December

All events are virtual webinars held at 1:30pm ET.



News & Calendar of Events

1. [06/27/12](#) | North Carolina User Group
2. [06/28/12](#) | Tap Into the Power of LinkedIn
3. [07/11-13/12](#) | SMPS Build Business Conference
4. [07/19/12](#) | Kona: Communication & Collaboration Tool
5. [07/26/12](#) | Top KPIs for Managing Projects
6. [10/15-18/12](#) | Deltek Insight Conference



News & Calendar of Events

Featured Firm

William H. Gordon Associates, Inc. (read the interview)

<http://www.fullsailpartners.com/featured-firms/>

Interested in being featured? Email info@fullsailpartners.com and let us know about your firm successes with Deltek Vision.

Blog Articles (www.fullsailpartners.com/FSPblog)

- Take the IT Challenge! Can your firm pass? Check out our blog article to test your firm.
- Who Ya Gonna Call? ...for Deltek Vision Support?
- Mobile App for Deltek Vision Timesheet. Did you know it's available?



News & Calendar of Events

Did You Know?

Need to quickly export information without running a report? Use the Grid View option in version 6.0 or higher. This option allows you to sort by field, filter information by column, and then export in Excel. A real time saver! This feature is available in all info centers and can be located on the application navigation menu.

Connect with Full Sail Partners:

 LinkedIn: <http://www.linkedin.com/company/full-sail-partners>

 Twitter: <http://twitter.com/#!/reachfullsail>



The Impact of Social Media for Professional Service Firms



Video



**Your competition is already
using social media, are you?**



Is social media a fad?



Or the biggest shift since the industrial revolution?



Are you keeping up with the next generation of communication?



Or are you losing traction because of lack of awareness of the impact of social media?



**Do you know what is being
said about your firm?**



*Or is your competition taking
advantage of those opportunities?*



**Would you rather cold call
and seek out services?**



*Or make a warm call and have
people find YOU?*



**Who do you trust? The
seller or a trusted peer?**



What are people saying about you?



It's not a matter
of *when* you will
participate in
social media, but
rather *how well!*



Moderator & Panelists

Moderator:

Sarah Gonnella with **Full Sail Partners**

As moderator, Sarah will lead the interactive discussion on the impact of social media and how your firm can leverage this technology to differentiate your firm.

Panelist:

Sarah Zibanejadrad with **Oasis Consulting Services**

Marketing Professional in the AEC Industry

As a panelist, she will provide answers to questions related to getting started and how to leverage social media at your firm.

Dave Mills with **Kittelson & Associates, Inc.**

Operations Manager & Social Media Leader

As a panelist, he will speak to the challenges and opportunities AEC firms face when engaging staff in social media, provide lessons learned, and discuss how technical staff can get involved.



Moderator & Panelists

Panelist:

Al Loise with **Vayu Media**

Social Media Consultant for Professional Services

His role on the panel will provide attendees perspective on how professional services industries are utilizing social media and discuss what is on the horizon for this technology.

Rep. Dar'shun N. Kendrick with **Kendrick Law**

Legal & Company Policy

Her role as a panelist will allow attendees to understand the importance of corporate social media policy.



Introductions

1. Introduction of you and your firm
2. Involvement in social media:
 - What social media do you use?
 - Goal of social media for each of those areas?
 - How many hours per week do you spend on social media?



Audience Questions



Moderator Questions



Firms are utilizing social media to building business, brand recognition and networking.

Which two social media tools could you not live without? (Examples: blog, Twitter, LinkedIn, Facebook, YouTube, Flickr, etc.)



What ways has social media replaced traditional approaches to business?



New technology is exciting for some and scary for others.

What worries did you have or firms that use your services have about social media and what advice would you provide to overcome those fears?



There are so many types of social media possibilities. Let's view a chart from online which provides a better understand of the social landscape and how a tool can help them.

<http://www.cmo.com/social-media-guide/2012/>



Now with a better understanding of how social media tools are leveraged...

Can you give us an example of one goal you are trying to accomplish and how you are utilizing social media to accomplish that goal?



**What metrics are you using
to track social media?**



Social media in some ways is still the wild, wild west. Whether you like it or not, you and your firm may be discussed on social media outlets without even knowing it.



What advice would you give to firms to protect their reputation?



Recently there was a legal case related to Twitter. An employee had a personal account that his firm also relied on him to push out their message. He built a following of 17,000 members. When he left the company he took them with him.

Although each case may be different, can you provide some guidelines of when a social media tool is considered the companies and when it is considered personal?



There are so many places to start. Let's discuss tackling social media.

What advice would you provide to get started in social media and what lessons learned would you offer?



What is the next up and coming social media trend to look out for?



Marketing Metrics

Presented by Full Sail Partners



Marketing Metrics

1. Do you have potential work to support staff?
2. Do you know how successful you are at winning projects?
3. Do you know the proposal cost vs. revenue generated?

How can you improve your business if you don't know what is working and more important, what isn't?



Marketing Metrics

Sales Forecasting

Opportunity Name	Company	Contact	Proposal Due Date	Est. Revenue	Probability	Weighted Estimated Revenue Start Date	Estimated Compl.Date
Organization: BO:AR Boston Architecture							
Stage: Negotiation							
Anderson Clinic Expansion	Anderson & Associates, LLC	DeRosa, George	9/1/2010	2,300,000.00	60.00	1,380,000.00 10/1/2010	5/1/2011
Total for Negotiation				2,300,000.00		1,380,000.00	
Stage: RFP/Q							
AI				500,000.00	50.00	250,000.00 9/24/2010	8/1/2011
T				500,000.00		250,000.00	
S							
Bl	Sep 10	Oct 10	Nov 10	Dec 10	Jan 11		
T						1,500,000.00 9/3/2010	6/3/2011
Tot:						1,500,000.00	
-						4,300,000.00	2,830,000.00
		200,845.07	194,366.20	200,845.07	200,845.07		
		200,845.07	194,366.20	200,845.07	200,845.07		
	5,608.97	24,839.74	24,038.46	24,839.74	24,839.74		
	5,608.97	24,839.74	24,038.46	24,839.74	24,839.74		
	122,627.74	135,766.42	131,386.86	135,766.42	135,766.42		
	122,627.74	135,766.42	131,386.86	135,766.42	135,766.42		
	128,236.71	361,451.24	349,791.52	361,451.24	361,451.24		



Marketing Metrics

Hit Rate by Percentage

Opportunity Name	Company	Est. Revenue	Probability	Weighted Revenue	Days Open Stage
Opportunity Owner: Hit Rate 0%					
Wesley Industrial Park Elevated Railway	The Bradford Group of Broward County	645,000.00	90.00	580,500.00	291 RFP/Q
Total for [blank]		645,000.00		580,500.00	291
Opportunity Owner: 00001 Apple, William Hit Rate 50.0%					
Balboa International Office and Commercial Complex	Dalton Brothers Construction Co.	79,000.00	100.00	79,000.00	215 Awarded
Belmont Park	Anderson & Associates, LLC	515,000.00	100.00	515,000.00	210 Awarded
Burlington Research Park	Peabody Industrial Group	1,500,000.00	80.00	1,200,000.00	637 Shortlisted/Interview
Cape Cod Vacation Club	Cape Cod Developer Group	2,500,000.00	100.00	2,500,000.00	323 Lost
Cariton Industries Plant Expansion		5,000,000.00	100.00	5,000,000.00	181 Awarded
I-66 Expansion	Virginia Department of Transportation	4,500,000.00	30.00	1,350,000.00	589 RFP/Q
Lower Patuxent Waste Water Treatment Facility	Metropolitan District Commission	4,500,000.00	70.00	3,150,000.00	625 Shortlisted/Interview
Newtown Village Airport Renovation	Dalton Brothers Construction Co.	750,000.00	100.00	750,000.00	517 Awarded
Total for 00001		19,344,000.00		14,544,000.00	3,297
Opportunity Owner: 00026 Johnson, Ann Hit Rate 33.33%					
Concord Center for the Arts	The Concord Corporation	2,300,000.00	50.00	1,150,000.00	289 RFP/Q
Morning University Student Union Renovation	Morning Foundation	2,600,000.00	80.00	2,080,000.00	641 Negotiation
NOVIS Telecom Regional Headquarters	Nowis Telecom	12,000,000.00	100.00	12,000,000.00	98 Awarded
Total for 00026		16,900,000.00		15,230,000.00	1,028



Marketing Metrics

Hit Rate by Revenue

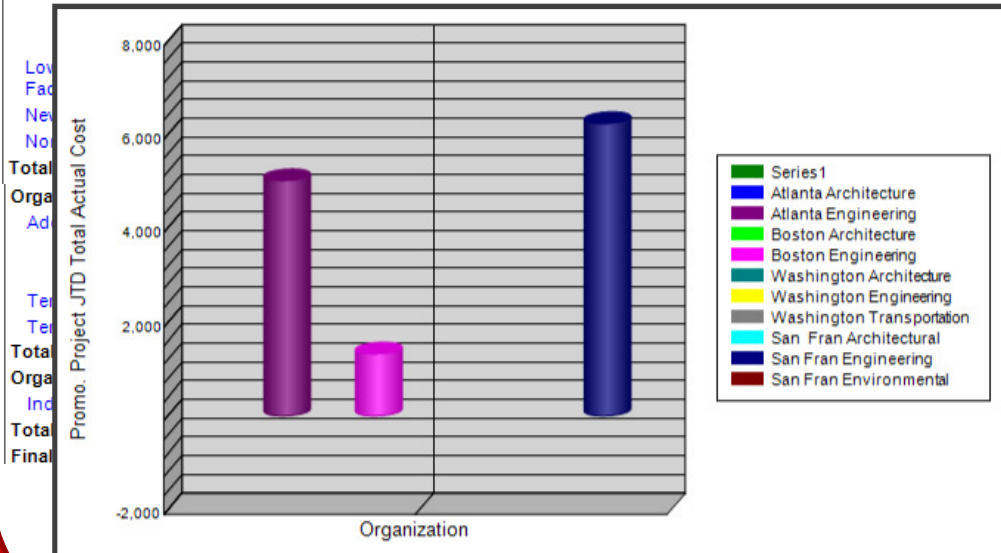
Opportunity Name	Company	Est. Revenue	Probability	Weighted Revenue	Days Open Stage
Opportunity Owner: Hit Revenue 0%					
Wesley Industrial Park Elevated Railway	The Bradford Group of Broward County	645,000.00	90.00	580,500.00	291 RFP/Q
Total for [blank]		645,000.00		580,500.00	291
Opportunity Owner: 00001 Apple, William Hit Revenue 32.80%					
Balboa International Office and Commercial Complex	Dalton Brothers Construction Co.	79,000.00	100.00	79,000.00	215 Awarded
Belmont Park	Anderson & Associates, LLC	515,000.00	100.00	515,000.00	210 Awarded
Burlington Research Park	Peabody Industrial Group	1,500,000.00	80.00	1,200,000.00	637 Shortlisted/Interview
Cape Cod Vacation Club	Cape Cod Developer Group	2,500,000.00	100.00	2,500,000.00	323 Lost
Carlton Industries Plant Expansion		5,000,000.00	100.00	5,000,000.00	181 Awarded
I-66 Expansion	Virginia Department of Transportation	4,500,000.00	30.00	1,350,000.00	589 RFP/Q
Lower Patuxent Waste Water Treatment Facility	Metropolitan District Commission	4,500,000.00	70.00	3,150,000.00	625 Shortlisted/Interview
Newtown Village Airport Renovation	Dalton Brothers Construction Co.	750,000.00	100.00	750,000.00	517 Awarded
Total for 00001		19,344,000.00		14,544,000.00	3,297
Opportunity Owner: 00026 Johnson, Ann Hit Revenue 71.01%					
Concord Center for the Arts	The Concord Corporation	2,300,000.00	50.00	1,150,000.00	289 RFP/Q
Morning University Student Union Renovation	Morning Foundation	2,600,000.00	80.00	2,080,000.00	641 Negotiation
NOVVIS Telecom Regional Headquarters	Novvis Telecom	12,000,000.00	100.00	12,000,000.00	98 Awarded
Total for 00026		16,900,000.00		15,230,000.00	1,028



Marketing Metrics

Hit Rate – Total Actual Costs for Promo Hours

Opportunity Name	Company	Contact	Stage	Est. Revenue	Probability	Weighted Revenue	Promo. Project JTD Actual Costs	Promo. Project JTD Hours
Organization: AT:EN Atlanta Engineering Hit Rate 0%								
Abington Elementary School	City of Charlotte	Martin, Nadine	RFP/Q	500,000.00	50.00	250,000.00	5,019.29	154.90
Total for AT:EN				500,000.00		250,000.00	5,019.29	154.90
Organization: BO:EN Boston Engineering Hit Rate 57.14%								
Belmont Park Grand Station Renovation	Anderson & Associates, LLC	Zimmerman, Dylan	Awarded	515,000.00	100.00	515,000.00		
Belmont Park	Anderson & Associates, LLC	Zimmerman, Dylan	Awarded	515,000.00	100.00	515,000.00		
Boston Women's and Children's Hospital	Sikes Consultants	Sikes, Carolyn	RFP/Q		40.00			
	Parkinson Associates	Parkinson, Frank						
	Sides Management Consultants	Sides, Franklin						
Children's Hospital Expansion	Parkinson Associates	Parkinson, Frank	Shortlisted/Interview	2,300,000.00	80.00	2,070,000.00	1,324.00	36.00
				4,500,000.00	70.00	3,150,000.00		
				750,000.00	100.00	750,000.00		
				840,000.00	100.00	840,000.00		
				9,420,000.00		7,840,000.00	1,324.00	36.00
				700,000.00	100.00	700,000.00	6,237.21	175.40
				3,200,000.00	60.00	1,920,000.00		
				3,200,000.00	60.00	1,920,000.00		
				7,100,000.00		4,540,000.00	6,237.21	175.40
				1,200,000.00	100.00	1,200,000.00		
				1,200,000.00		1,200,000.00		
				78,944,000.00		58,459,500.00	12,580.50	366.30



Marketing Metrics

Client Satisfaction

1. Would it be helpful to know if business is increasing or decreasing for a client or contact?
2. Do you have a client nurturing and a client maintenance plan?
3. Do you treat all of your “best” clients the same as new clients?

It costs 7 times more to obtain a new client than to maintain existing clients.



Marketing Metrics

Ways to Gauge Client Satisfaction

1. Survey (corporate vs. project)
2. Debrief (corporate vs. project)
3. Understand their expectations

What other metrics
provide you insight?



Marketing Metrics

Client Relationship Evaluation

Atlantic Research Corporation *

General | Contacts | Associations | Activities | Opportunities | Projects | Additional Info | Files

Number: 0000000192 Type of Company: Health Care

Name: Atlantic Research Corporation Status: Active

Client: Vendor Relationship: Nurturing

Date	Previous Classification	Current Classification
3/31/2011	Established	Nurturing
12/31/2010	Nurturing	Established
9/30/2010	Prospective	Nurturing
6/30/2010		Prospective

Client Classification

Established

Client has more than 3 projects or more than \$250,000 over the past 12 months.

Nurturing

Client has provided 1-2 projects or less than \$250,000 in the past 12 months.

Prospective

Developing relationship. No past projects.



Join the Social Media Conversation

 LinkedIn: <http://www.linkedin.com/company/full-sail-partners>

 Twitter: <http://twitter.com/#!/reachfullsail>



For more information contact:

Sarah Gonnella
Director of Marketing

888.552.5535 x102

info@fullsailpartners.com

Hearing what you have to say, whether criticism or praise,
helps us provide you better information and service.

Please fill out the survey and provide your feedback.

