GUEST SPEAKER
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Drive strategic marketing culture with go/no-go form

Being informed and targeted can be the difference between winning and losing pitches.

Maximizing your marketing resources to achieve results has never been more important than now. And we all know that informed strategy, good decision-making and efficient processes can increase return for investment. At **HMC Architects** (Ontario, CA), a 400-person architecture firm, we recently found that the key to driving a more strategic marketing culture came in the form of a form: our go/no-go decision-making form.

Nobody likes forms; especially those go/no-go forms that have been floating around the industry for decades. HMC had been using one for years, only to find that it didn't really get the results that it was designed to achieve. As we sharpened our business strategies and implemented a more rigorous structure of accountability, it became apparent that the form had several major flaws— or "cultural loopholes." In other words, people found ways to get the required score without much thought, and the process itself was allowing behavior that didn't support the culture we were trying to build. And as the economy fell, we also fell— right back into a shotgun approach to pursuing projects.

So we set out to close the cultural loopholes and develop a more strategic marketing culture.

First, we looked at our strategic plan, mission, vision and values. We also looked for patterns of past success. Then we examined our existing form and process along with best industry marketing practices. This helped us identify the loopholes and create a vision for what our ideal process would look like.

Next we crafted the components of the form. There are several basic categories that need to be evaluated: relationship to the client, experience and expertise related to the project, and quality of the competition. In each category, we identified the specific criteria that we knew would determine success— for us.

Then we customized, prioritized and weighted the criteria. For example, we recently implemented a program to categorize clients as existing, high potential, or future potential, so the first item on our form assigns a value based on those three categories (12, 11 or nine points, respectively) and zero points for a client with little or no established relationship. You can see how weighting the points can dramatically affect the scoring— if the client hasn't been on our radar screen, it's pretty hard to make up nine or more points. We determined that having an established relationship with the client is the most important factor for our success— and the place where we had the most loopholes— so we gave it the most points and no room for interpretation. As a bonus, we found that by incorporating another HMC process into our form (client categories), we culturally reinforced both processes.

Next, we looked for other criteria that would support the cultural changes that we wanted to make. For example, we wanted to minimize last-minute decisions (that keep the marketing staff up past midnight and result in poor-quality proposals), so we incorporated criteria for how early we learned about the RFP, how much time we had to respond, and whether or not the right people were available to put together a quality proposal. Points add up (or subtract) quickly.

We also wanted to promote a more collaborative approach to support organizational changes driven by our strategic plan, so we added check boxes to make sure the right people were involved in evaluating every pursuit.

Looking beyond the go/no-go process, we also saw an opportunity to improve our proposals and presentations. For example, we struggled with developing compelling strategies that addressed the client's issues in the proposal (and minimized boilerplate), so we added required fields for the client's hot buttons and our relevant differentiators. Those answers are reviewed (sent back when necessary) and transferred directly onto our proposal and presentation process tools to reinforce strategy and differentiators consistently throughout the pursuit.

In the end, our form has 17 criteria in five

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categories and the weighted scores equal 100 for a "perfect" pursuit. The spreadsheet calculates the points and assigns a traditional letter grade (A+ down to F), for easier discussion. Each grade requires a different level of approvals, which allows lower scores to be considered for strategic reasons, but only with buy-in from key leaders. An additional field is provided to note justification for pursuing a project with a low score, as well as mitigation strategies. We didn't want to create a form that dictated an answer— but rather a tool to encourage strategic, collaborative decision making.

Rolling out the new form was less painful than expected because it aligned with our strategic plan and supported the cultural behaviors we were encouraging across the organization. We had a few old dogs cringe at the two-page form, but once they started using it, and saw how easily it supported good decision-making and increased ROI, it quickly became accepted practice. And the best feedback came from a recently hired principal, who said, "This go/no-go form is better than any I saw at (two well-known national firms) in 17 years. Good job!" And our marketing measures also show that our efforts are paying off, even in this tough economy. No shotguns here. And no more loopholes. **ɢ**

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