

Notes Template for Facilitators – Fall 2020 Business Round Tables

Topic: Business Development in a post COVID World

Facilitator: **Ed Jackson**

Number of participants: 11

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	Client communication: Stretching the day, shared experiences of COVID with the client (home schooling), created an intimacy in the client relationship and familiarity that was not there before. Easier to find time with clients because the virtual format is more flexible (less travel).
2	Business Development overall has been challenging due to competing priorities (personal and professional).
3	Focusing on essential services in the Public Sector. Experiencing a backlog in releasing new work (Capital projects) in the public sector due to closed municipal and state offices and funding uncertainty. More pronounced in some geographies i.e. NE.
4	Concern regarding future infrastructure spending. Government spending on infrastructure varies. Severe slowdown in NE, strong in the West. Lots of movement
5	Business development is two-way, Prime Contractors have been reaching out whereas wouldn't in the past. Alternative BD meetings (Golf).
6	New services: Commercial is down. Industry is growing (especially food services). IH and EHS services. GIS/Data Management: Clients are investing in technology platforms/data solutions to manage environmental data and support more remote working environmental compliance teams.
7	Additional opportunities with referral and repeat work because people are leveraging their existing networks and not seeking new suppliers. Getting to the new client is challenging. Focus on existing clients.
8	Messaging: Public agencies have been asking for discounts and some private sector clients. Leverage relationship.
9	Client/Industry messaging is challenging because of no in-person events (conferences), social media and webinar exhaustion. Need to get creative with promotional efforts. Recognize new opportunities to meet in-person with clients.

10	Industry organizations have adapted with increased attendance of webinars. Outreach to existing clients has generally gone well. Newer client relationships have been slow.
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Summarize the three most important items from the discussion that should be shared with GBA members:

1	COVID restrictions have created new communication channels and ways of interacting with clients. Overall, the “gaps” in the traditional ways of doing business development have been filled through increased availability of clients and willingness to connect virtually. Promotional activities have been impacted (e.g. lack of conferences) and it is harder to differentiate and promote services to new clients.
2	Increase awareness of service capabilities. Share client knowledge to leverage network and cross sell. Increased dependency by clients to procure services through existing networks, which is good if you have the relationship already, but challenging if it is a new client.
3	Strategy: Targeting industries that are more resilient or will become growth industries to support society adjusting to COVID/remote work and changing economics. Just started mostly, not a priority. Re-investing savings from reduced travel into technology to support remote working, data management efficiencies and innovation.

Topic: Business Development in a Post-Covid world

Facilitator: June Jewell

Number of participants: 10

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1	Schedule meetings with clients every 2 months and find out new opportunities.
2	Educate clients to cross-sell
3	Provide brown bag virtual education for clients
4	Clients are more open to discussions and have accelerated some work

5	Texting with clients is more prevalent
6	Work has become more casual and personal
7	They have been more focused on pipeline. Improved use of CRM. Better forecasting.
8	There has been more pressure to use LinkedIn
9	They have had to change their lingo to relate to Covid
10	Training staff to cross-sell

Summarize the three most important items from the discussion that should be shared with GBA members:

1	There are opportunities due to the pandemic and lockdown that need to be uncovered by having more and better conversations with clients
2	More firms are producing webinars and content for their clients and social media
3	Clients are more open to meet and more available due to less travel and demands.

Topic: Business Development in a Post-COVID World

Facilitator: Chuck Brewer

Number of participants: 10

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	Business development groups meeting by zoom to share leads. New groups are popping.
2	Doing internal training of staff on all the different business lines you have. Most staff are in a particular business line and do not know all the different services that your company can provide. Train them so when they are out talking with their clients they can be selling for the entire company.
3	Stay in contacts with your clients, you are their Trust Advisor.
4	Most meetings always start with a safety moment, add a business development moment to follow the safety moment.
5	Phone calls with clients are becoming much more liberal. Kids running around dogs barking. Gives us all many more things to talk about and get to know your client on a more personal level.
6	If a client is willing to meet in person, find out what they like to do. Such as clay shooting, golf, or pickle ball. Things outside.
7	Keep doing what you did in the past!!
8	2021 Logistics, Health Care, Tech and large warehouses

Summarize the three most important items from the discussion that should be shared with GBA members:

1	Doing internal training of staff on all the different business lines you have. Most staff are in a particular business line and do not know all the different services that your company can provide. Train them so when they are out talking with their clients they can be selling for the entire company.
2	Move your meetings outside!!

3	Keep doing what you did in the past!!
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Business Development Breakout Session

Facilitator – Steve Thompson

Client contact: A number of participants mentioned that their clients have been more open than to hearing from them. There are plenty of common challenges to talk about both personally and professionally and people are craving more human connection. That contact time was both through the usual channels plus a much greater use of videoconferencing. Staff with dedicated business development responsibilities were busier because of the number of meetings and calls they were having but were more efficient because they weren't on the road as much. One company that used to do a fair number of face to face "lunch and learns" with clients is doing many more of them over Zoom and will use that as their preferred tool in the future.

Business opportunities: There are opportunities in some hot markets that are being amplified by COVID – logistics & warehousing (i.e. Amazon); last mile delivery; food, food processing and storage; and data centers. Companies with a diversified client base are more resilient and doing better than companies with a more concentrated client base.

Future outlook: Not too many smiling faces on the screen. There were predictions of declining business by a number of participants. Some concern about the housing market bubble collapsing in the next few years. Most people wouldn't venture any guesses beyond 6 months out. The outcome of the upcoming election was considered more important than COVID in terms of future work for our firms (no preferences as to party were divulged).

Topic: Business Development in a Post-COVID World

Facilitator: Matt Moler

Number of participants: 9

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	Calling folks is a real plus. Conversations are much more personal since in a relaxed environment at home.
2	A lot of outside events are still planned and occurring (as they allow for social distancing). Networking still occurring at those events.

3	Online resources such as BidClerk are helpful. They can be hit and miss. Some projects listed are put on hold.
4	These times have caused folks to reach out to their larger network to see what is coming around the corner (especially teaming partners).
5	Markets are shifting somewhat, but not cause for totally shifting mindset on what our firms are chasing.
6	New or expanded services: Indoor air quality focused services. Health and safety focus on active construction sites related to site audits (not enforcement). Risk and resiliency group focusing on supply chain management.
7	Messaging – just reiterating the basics (we are open).
8	One firm has hired a very focused marketing person to improve visibility in the market. They also hired a very senior technical person with data visualization, which is something their clients said they wanted. Will hopefully position them for big wins down the road.
9	New or expanded ideas related to BD: Webinars being offered (offered to clients free of charge), which helps keep focus on their company (typically project case histories). Also provides free PDH's. Formation of small Leads groups that meets regularly (either virtual or in-person). Small groups visiting bars or outdoor restaurants for social gatherings has worked too. Virtual happy hours-small groups seem to work pretty well rather than invites to larger groups.
10	2021 Outlook - There has been a reduction in design work so far. Concerned about construction next year – hoping it will rebound about middle of next year. Lots of businesses now out of business. What impacts to industry will that have? Office retrofits possibly. Companies moving into the suburbs (out of cities) due to COVID.

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2	<p>New or expanded services:</p> <p>Indoor air quality focused services.</p> <p>Health and safety focus on active construction sites related to site audits (not enforcement).</p> <p>Risk and resiliency group focusing on supply chain management.</p>
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