Getting Specified
Marketing to Design Professionals

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Understanding the Issues
The Product Representative’s Viewpoint

• Timing:
  • Too early in the project schedule
  • Too late in the project schedule

• Changes after initial product selection: What happened?
The Design Professional’s Viewpoint

• Fees are shrinking
• Deadlines are shorter
• Lawsuits are rampant
• Technology is exploding
Getting the Sale

• What is Your Goal? Your product listed in a project specification
• Better yet: Your product listed in the design professional’s office master specification
Getting the Sale

• How Do You Achieve That?
  • Get the right product information in the right format to right person at the right time
  • Make yourself the expert in your field; the design professional’s “go to” person
  • Avoid “reactionary” selling; get involved early in the process
  • Follow the project
Factors Affecting Product Decisions
Decisions, Decisions

• Huge number of product decisions required on any project
• Product decision process is not always what it might seem
• Owners are exerting more influence over product decisions
• “Best product” versus “best product for the project”
Type of Product

• Design-Related
  • Product selections have a direct impact on the project’s physical appearance, either exterior or interior
  • Depending on office size, decisions are made by a partner, project manager, or project designer

• Technical
  • Product decisions have little or no impact on project aesthetics
  • Depending on office size, decisions are made by a partner, project manager, or specifier
Office Size

• Small Offices
  • 10 or less employees
  • Design and technical decisions are made by a limited number of people, typically a partner

• Medium Offices
  • 10 to 50 employees
  • Projects move through various departments
  • Design and technical decisions may be made by different people, either a partner, project designer, or project manager
Office Size

• Large Offices:
  • 50 or more employees
  • Projects move through various departments
  • Design and technical decisions are made by different people
  • Can function on the “studio” concept
  • Multiple offices dictate multiple sales calls

• Specification Consultants:
  • Small offices that work with numerous design firms
  • Make technical decisions on behalf of their clients
  • Often asked to recommend products
Project Phases

• Schematic Design Phase
  • Early conceptual design stage
  • Product decisions limited to preliminary selection of major design-related products

• Design Development Phase
  • Schematic Design is refined and expanded
  • By end of this phase major design-related decisions may be completed
Project Phases

• Contract Documents Phase
  • Design development is expanded into documents suitable for bidding and construction
  • Remainder of design-related product decisions and most technical decisions are made during this phase

• Bidding or Negotiation Phase
  • Contract Documents are issued for bidding or negotiation
  • Product decisions limited to possible approval of substitute materials
Project Phases

• Contract Administration Phase
  • Low bidder or selected contractor released to perform the work
  • Product decisions limited to possible selection of additional products due to changes, and approval of substitute materials
Why Products are Selected
Product Considerations

• General Product Considerations
  • New or time proven product
  • Suitable for its intended use
  • Used in traditional ways or unique installation
  • Available at project location at required time
  • Who distributes, installs, and maintains
  • Are there equivalent products
  • Compatibility with other products
  • Sustainable product
Product Considerations

• Aesthetic Considerations
  • Color
  • Texture
  • Coordination with other products

• Performance Characteristics
  • Basic function
  • Required attributes
  • Conditions unique to this project
  • Performance history
Product Considerations

• Installation
  • Ease of installation
  • Time/weather limitations
  • Project conditions
  • Special training or tools

• Safety
  • Fire safety
  • Life safety
  • Physical safety
  • Accessibility
Product Considerations

• Durability
  • Wear resistance
  • Strength
  • Weather resistance

• Cost
  • Initial cost
  • Life cycle cost
Product Considerations

• Manufacturer
  • Reputation
  • History

• Warranty
  • Length
  • Strength
  • Exclusions

• Applicable Codes and Standards
  • Building codes
  • Reference standards
Product Considerations

• Sustainable Products:
  • LEED Certification Process: Project achieves certification to one of four levels based on number of points obtained
  • Design-Related Points:
    • May relate to products, but only in how and where they are used, not in product attributes
    • Have little or no impact on product specifications
    • Example: Daylighting to regularly occupied spaces
  • Product-Related Points:
    • Have a direct relationship to products used
    • Examples: Low-emitting products and those with recycled content
Product Considerations

• Sustainable Products
  • Greenwashing
    • Producing misleading information about products, either intentionally or due to lack of familiarity with LEED
    • Provide useful sustainable product information
  • Common Greenwashing Practices
    • Stating that products will obtain points simply by their use
    • Stating that product are “LEED certified”
    • Omitting specific sustainable attributes
    • Stating that products are “recyclable”
    • Stating that products are suitable for points that are not applicable
Effective Product Information
Hard Copy or Electronic

• Hard copy is being replaced by electronic, but somewhat slowly
• Senior office staff often prefers hard copy, while younger staff prefers electronic
Company Websites

• Do not assume that the design professional knows which product is needed before they get to your website
• Do not make design professional register as a prerequisite to website access, or offer an “opt out” button
• Separate pages for design professionals, contractors and homeowners
Types of Product Information

Product Introduction
  • Essential for initial product consideration
  • Architects are visual people; say it with images
  • There will be a need for effective hard copy product introductions, even after other product information goes electronic

  • Technical Data
    • Product attributes, uses and limitations
    • Tests and certifications
    • Installation and maintenance
    • Availability
Types of Product Information

Drawing Details
- Describe product installation and relationship to other construction
- Available in multiple CAD standards
- Suitable for incorporation into BIM systems

Guide Specifications
- “Master” specification containing editing notes to assist in product selection and specifying
- Prepared according to CSI/CSC principles
- Based on your product without attempting to close specification
- Available in multiple word processor formats
Types of Product Information

• Samples
  • “Show and tell” works; design professionals are visual people
  • Don’t overwhelm the design professional; space is limited
Delivery Methods

• Internet
  • Sweets (sweets.com)
  • ARCAT (arcat.com)
  • ZeroDoc (zerodocs.com)
  • 4Specs (4specs.com)
Delivery Methods

• Hard Copy
  • Out of date quickly after it is printed
  • Space limitations in design offices may preclude keeping hard copy

• CD’s
  • Electronic introduction – pretty pictures only, with link to website for more information
  • Cheap and recyclable

• Flash Drives
  • Cost is coming down
Reaching the Design Professional
Reaching the Design Professional

• Seminars: Office “Lunch and Learn”, trade shows
• Webinars: Low cost and good attendance
• Internet:
  • Manufacturer websites
  • Construction product directories
  • Cloud-based collaborative websites
Reaching the Design Professional

• Product shows: AIA, CSI, GreenBuild, regional and state shows
• Periodicals: Architecture, Architectural Record, Specifier, Building Design and Construction
• Mail
• E-mail
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Finding Project Leads

• Personal relationships with design professionals
• Document services: Dodge Reports, Reed Construction Data, BidClerk, iSqFt, others
Rules for Effective Product Presentations

- Make the presentation clear and understandable
- Make the presentation personal
- Make the presentation participatory
- Let the design professional steer the agenda
- Gather information
- Avoid negative selling
- Be respectful of time
- Close with questions
Mistakes Made by Product Presenters

- No presentation objectives
- Mediocre first impression
- Lack of preparation
- Poor visual aids
- Lack of enthusiasm
- Weak eye contact
- No audience involvement
- Lack of facial expressions
- Sticky floor syndrome
- Ineffective closing
In Summary

• Stop reactionary selling; get involved early and get in the specification
• Make yourself the expert; the design professionals’ “go to” person
• Follow the project
Ron Blank & Associates, Inc.

• Bridging the gap between design professionals and product manufacturers
  • Continuing education for design professionals
  • CE Academy
  • Architectural Specifications program
  • Seminars and webinars

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