

## **STRATEGIC RELATIONSHIP MARKETING TRAINING (SRM):**

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### **BUSINESS DEVELOPMENT BOOT CAMPS TO GAIN AND RETAIN CLIENTS**

Relationships build business and activities that support relationships are the most cost effective means of gaining and retaining new clients. This program is inspirational and motivational while also extremely tactical and practical.

- My goal is to deliver programs that builds skills and understanding of the Relationship Marketing processes while empowering professionals with tactics and techniques that expand your client base
- Many professionals already possess "relationship skills" that have placed them in their current roles, my approach is take the experience these leaders have gained and formalize a program that teaches relationship marketing skills to all appropriate levels within the business (particularly to professionals who are on the front line of client relations)
- Anyone who works for your firm is an ambassador for the firm and a potential channel for new business



### **What I do...**

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- Provide expert training that is based upon extensive experience with professionals who need to enhance client relationships & bring in new business
- Deliver experiential versus didactic sessions. Few want to be told want to do but rather most professionals want to adopt what will make them more successful.
- Require senior management buy-in to my training as the importance of SRM must come from the top i.e. require senior management introduction at the initial session
- Build trust and confidence with your professionals, while teaming with them
- Want to build a lasting, successful, mutually beneficial relationship
- Enjoy what I do!

### **...and what I don't**

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- Work on multiple assignments to maximize a margin or growth goal
- Staff program with inexperienced resources/lose sight of your business objectives
- Duplicate work already available in house or from previous engagements
- Commit to unrealistic outcomes or unrealistic results

Delivery is in a five phased program for professionals in such fields as accounting, engineering, IT, law, architecture, pharmaceutical and financial services. It delivers specific guidance and coaching in business development and relationship marketing. Phases include:

- I. Interviews with a selected number of professionals
- II. Development of 2 Business Development Sessions
- III. and IV. Delivery of 2 Business Development Sessions
- V. Course Evaluation & Analysis

### **Phase I. Interviews with selected professionals**

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- Up to 4 individuals are selected who will be interviewed by Strelmark prior to the start of the program
- The initial interview is with a leader of the firm to set goals and objectives
- One individual will be viewed as a “star”, i.e. with excellent business development and client relationship skills. This individual will have many successes under his/her belt and be viewed as a good example of what a particular firm wants and expects of other professionals
- One individual who is weaker in desired skills. This individual would have many concerns, be less comfortable in the business development role and less skilled at client retention
- Another individual would be “middle of the road” which is usually representative of the entire group
- The interviews will be up to 1 hour in duration

### **Phase II. Development of 2 Business Development Boot Camps**

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- The interviews enable Strelmark to assess current skills, determine the most desired aspects of relationship marketing training and to become more familiar with firm’s culture, terminology, expectations and general modus operandi
- Based upon the findings, (i.e. answers to questions proposed by the interviewer) the initial two sessions will be designed to address existing concerns and to set the goals to be accomplished during the 2 training sessions
- Power point slides will be developed for use in conducting the 2 sessions

### **Phases III & IV. Delivery of 2 Business Development Boot Camps**

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- These interactive “edutainment” Business Development Boot Camp sessions are powerful because your professionals will be highly engaged and captivated to learn:
  - 1. “How To Gain & Retain Clients”
  - 2. “Networking and Presentation Skills”
- Attendees will have similar years work experience. The initial session will be introduced by a senior professional from the firm. Emphasis to be placed on the importance of gaining and retaining the firm’s clients and therefore growth
- The format will include attendee participation, break out groups, and feedback
- The content is intended to leave all attendees with a clear understanding of relationship marketing, why it works, how it works and how to individually apply the principles in “real life” experiences to further the growth of the firm

### ***“How to Gain & Retain Clients” focuses on:***

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- Attendees receive principles of “human relationship truths”
- Why people want to work with certain types of people (and not others)
- How to individually apply the principles in “real life” experiences to further the growth of your firm
- Facts that attendees can use to build a lasting, successful, mutually beneficial relationships to grow business with any individual they interact with, starting immediately
- Session is experiential rather than didactic
- Content is imparted with different modes, statistics, movie clips, case studies, interaction, break out groups, all intended to ensure penetration to professionals with different learning styles
- Factors in winning professional service engagements will be delivered
- Group interaction will be moderated by the instructor to deliver tangible, believable methods of approach when dealing with clients in your space
- The Five “C”s for effective business relationships is explained, delivered and presented with real life examples
- The “ALWAYS” of beneficial interactions makes sure that all the content is most memorable

### ***“Networking and Presentation Skills” focuses on:***

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#### ***NETWORKING:***

- How to identify prospect and client needs/issues/challenges
- Determining achievable objectives and timeframes
- Leveraging “making an impact” works and how to use it as a tool
- Understand how individuals/or team *really* come across to others
- The roles of verbal and non-verbal communication
- Establish rapport with prospects, clients and colleagues easily as well as quickly
- How to work a room, the “Do’s and Don’ts” of networking
- Naturally project greater competence with your first impression
- Increase results due to applying tactical rules with stronger self-confidence
- Present powerfully at business-related social events

#### ***PRESENTATION SKILLS:***

- Review of RFP to determine response and presentation
- Competitive landscape & relationship mapping
- Messaging, theme development & response hot buttons
- Team positioning and role presentation
- Individual coaching on content, differentiators, impact & track record
- Presentation review, compilation, editing where necessary
- Capability layouts, review of boards, expertise & testimonials etc.

### ***Phase V- Course Evaluation***

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- Each of the attendees after each session will have been provided with a course evaluation forms
- Evaluation of the feedback will be presented analyzing the successes, the concerns and next steps

***Takeaways include:***

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- Case studies from over 25 years of working with professional service firms to grow their business
- Practical & tactical tips to build lasting, successful, beneficial business relationships
- Human relationship truths to apply for gaining & retaining clients & employees in every situation
- Motivation and inspiration to attain business development goals

***Deliverables:***

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- Provide expert training that is based upon extensive experience with professionals who need to enhance client relationships & bring in new business
- Attendees benefit from the time the instructor has taken with leaders of the firm who are then buy-in to our training as the importance of relationship management must come from the top (i.e. require senior management introduction at the initial session)
- In order to work with your professionals in the future, the trainer builds trust and confidence with your professionals, while teaming with them, and personifies an example of client/customer orientation, they are therefore being delivered “an example”
- The most important deliverable of this program is that your professionals will be empowered to do what you need them to do in order to succeed. This is attained through the aggregate of the “experience” during the two hour time frame

**Duration- One month start to finish.**

**Fee- \$9,500k due upon delivery of final phase**

**Hilary Fordwich**  
**President and Founder of Strelmark, LLC**

With a career spanning more than 25 years and traversing the globe, Hilary Fordwich is a nationally respected expert in business development, strategic relationship building, and client relationship management for professionals in service organizations and knowledge-based industries.

For more than a decade, Hilary served as head of global business development for international accounting and consulting firm KPMG where she worked in a number of the firm's offices including Manhattan, Long Island, and Washington as well as oversees in Amsterdam. Stateside, she has held other high-level positions at leading firms including Beers & Cutler, PLC (the largest DC regional accounting firm) where she directed marketing and technology-provider James Martin & Company (now Headstrong) as Vice President of Global Marketing and a member of the firm's Executive Board. Hilary has also served as Managing Director at Qorvis Communications, LLC, a full service PR, IR, and Public Affairs firm.



In addition to speaking and working with Fortune 1000 professional service firms, Hilary has presented at leadership, trade, and professional conferences for organizations including the US Chamber of Commerce, United Professional Sales Association, Women in Technology (WIT), the American Marketing Association, National Press Foundation, the PGA Merchandise Show, the Information Technology Services Marketing Association, Greater Washington Board of Trade, Commercial Real Estate Women (CREW), Microsoft's Annual Marketers Conference, the Legal Marketing Association, and the Society for Marketing Professional Services, among others. [Click here for an extensive listing.](#)

A 9-handicap golfer who competed in the US Women's Southern Amateur the last three years, Hilary appears regularly as a business and golf expert on DC's NewsChannel 8's *Capital Golf Weekly* as a regular commentator of *Hilary's On Course* as well as *Golfing with Hilary* on Washington Post Radio's MetroTalk, 107.7FM. She also lectures and helped design the curriculum for the University of Maryland's *Golf for Business and Life* program, a new PGA sponsored 3-credit course offered to graduate business students. A featured speaker for Women On Course, a Greater Washington regional golf program sponsored by the Executive Women's Golf Association, Hilary has also helped organize golf tournaments for the Greater Washington Board of Trade, the March of Dimes, the American Cancer Society, and WIT.

Hilary is currently the regional emcee for the business development entity Accelerent. She has written a monthly expert opinion column on business development for The Washington Business Journal. Her advice has been featured in *The Washington Post*, *The New York Times*, *CNN Fortune*, *Chicago Tribune*, *NPR's Marketplace*, *USA Network*, *CBS Marketwatch*, *Legal Times*, *AOL Sports*, *The Wall Street Journal*, *CareerBuilder.com*, and many other national and regional media outlets.

Hilary serves on the boards of The First Tee, and Junior Achievement and holds leadership positions with a number of organizations including, the Northern Virginia Technology Council (NVTC), The Leukemia Foundation, American Air Museum in Britain, The March of Dimes the British American Business Association (BABA), and the Special Olympics, among others.

Born in England, she became a US citizen in 1982 and graduated Magna Cum Laude from UVA at Mary Washington College. She resides with her three children in the Washington DC area.

## Speaking Engagements Include



## Clients Include

