

Maximize Your Marketing

Marketing for Public Contracting + Real Talk About AI

Ricardo Ibarra, October 2, 2025

Hi, I'm Ricardo

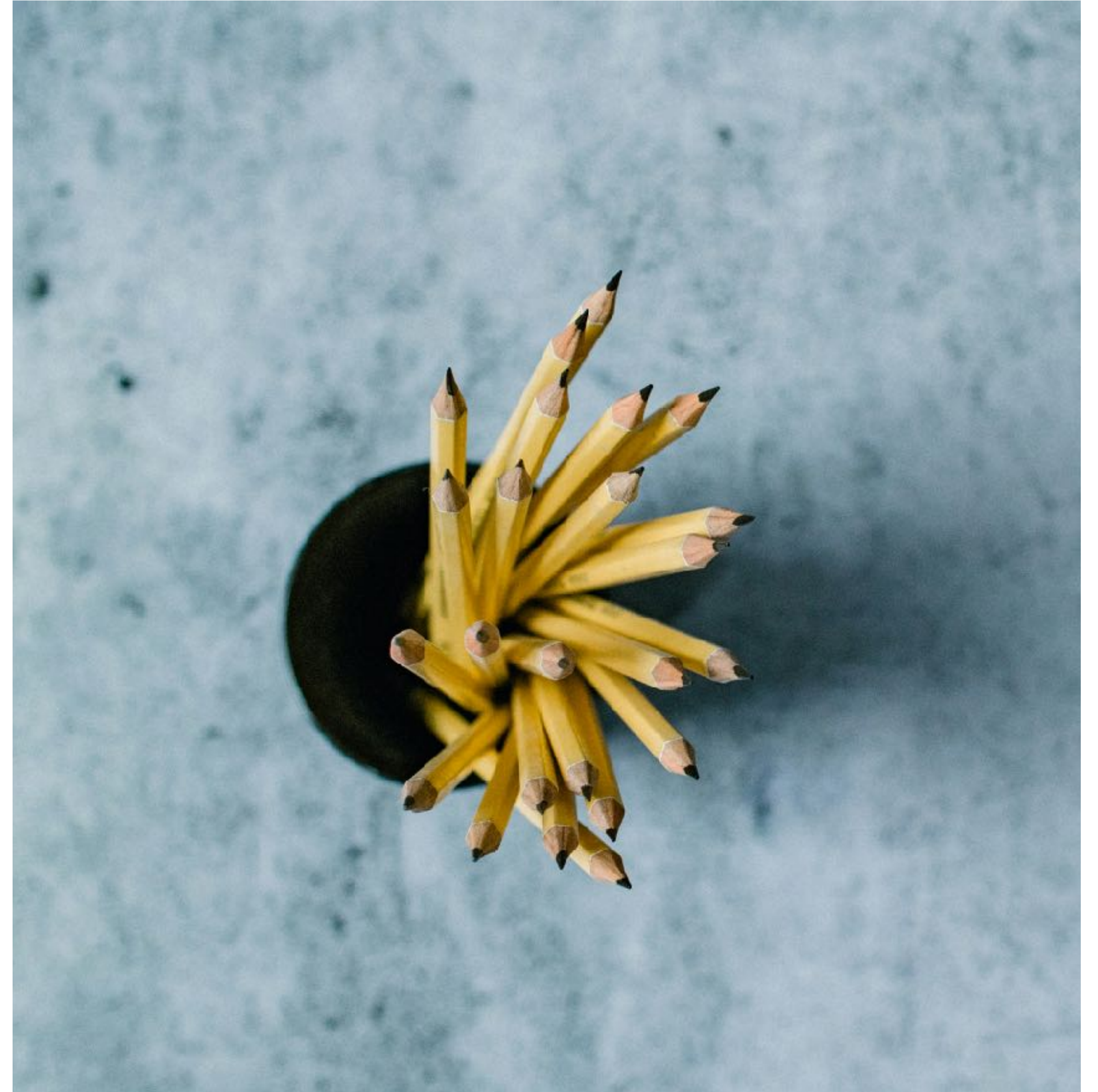
President & Creative Director, Trio Group

- 20-years in design & marketing
- Clients include: WA Health Benefit Exchange, Dept. of Emergency Mgmt., Office of Equity, King County, Sound Transit, City of Seattle, and **dozens of small, diverse firms.**
- Loves: cooking for friends, cats Sprig & Tito, Pokémon GO



Today's Workshop

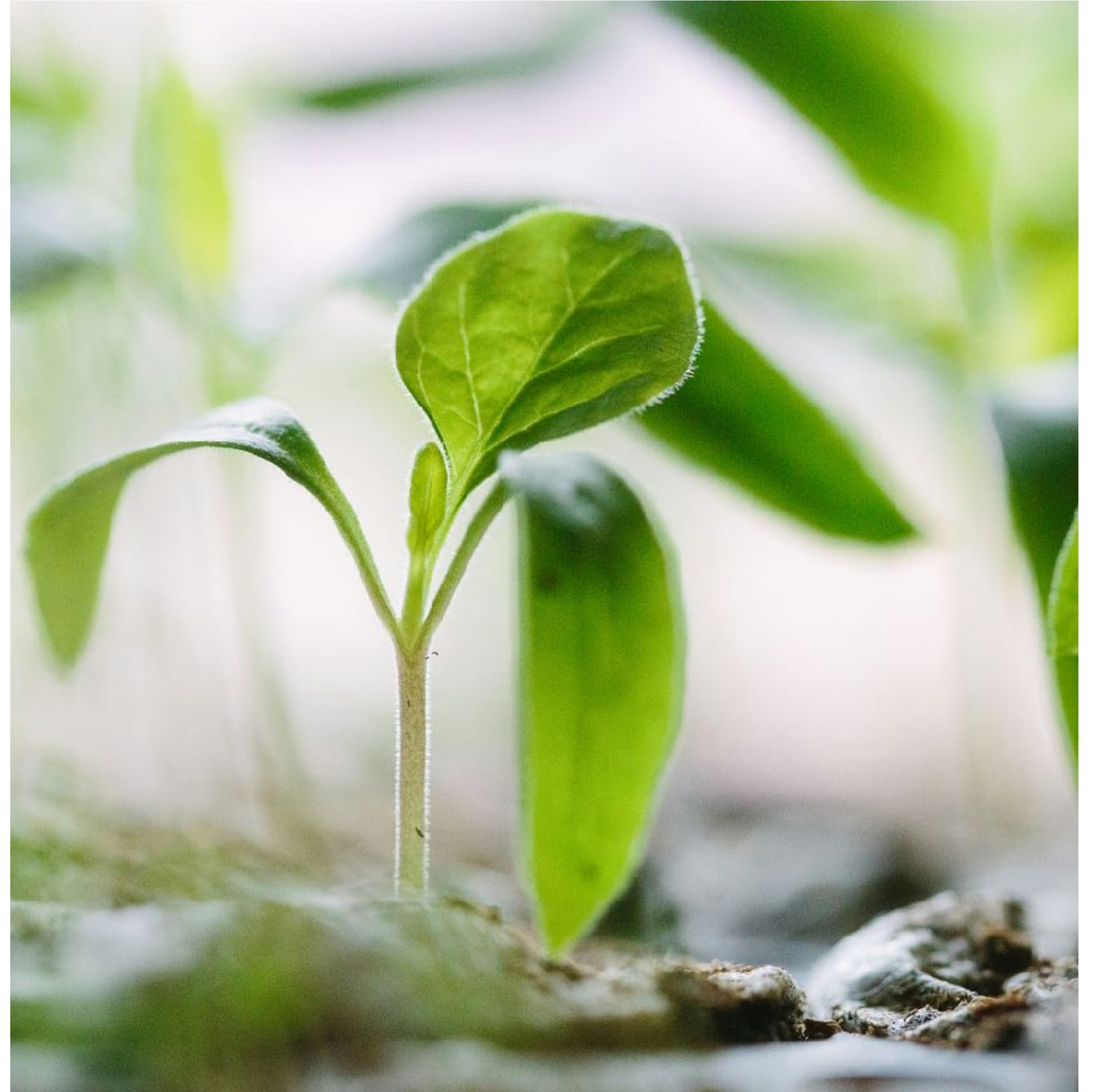
- Introduction
- Customer Lifecycle
- Marketing for Public Contracting
- Marketing Strategies
- Create Your Marketing Campaign
- AI for Business



Customer Lifecycle

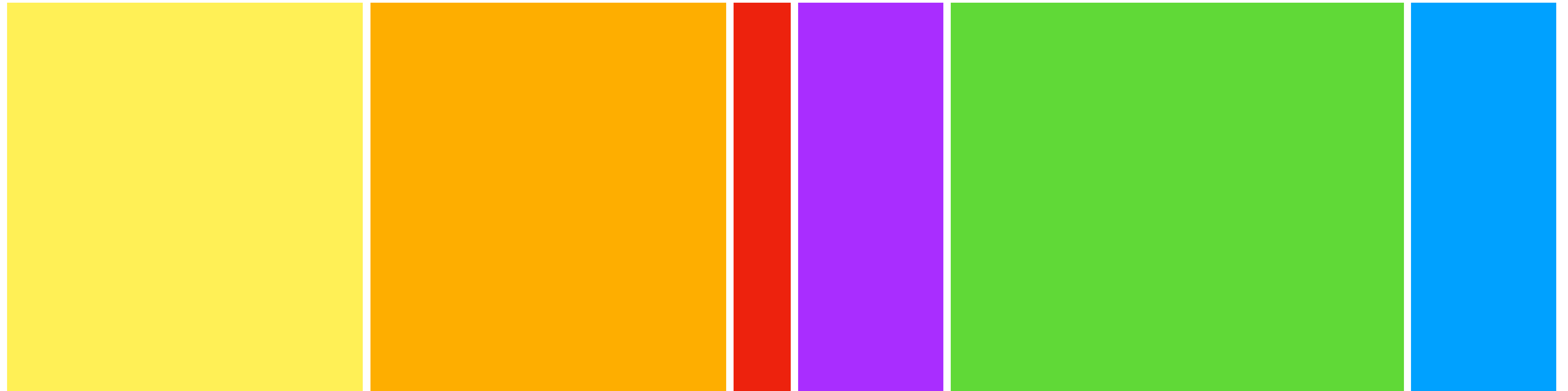
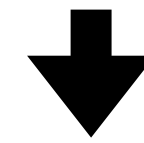
Customer Lifecycle

- A client lifecycle is **six phases** that describe how a **client moves from problem to solution** and beyond.
- Aligns business activities to attract, convert, and support customers from beginning to end.



Customer Lifecycle Phases

PURCHASE



DISCOVERY

DELIBERATION

DECISION

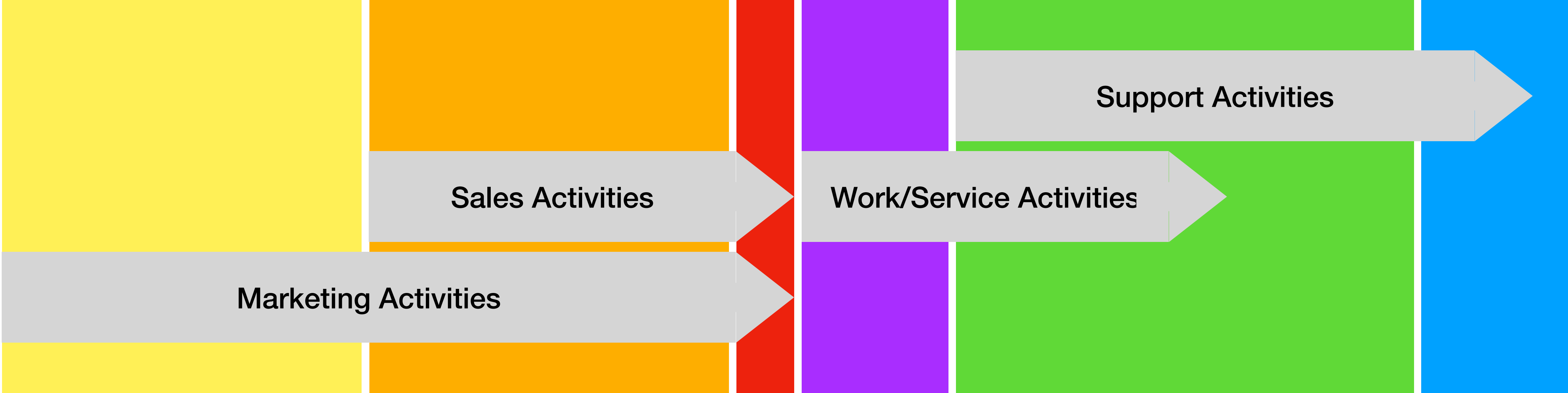
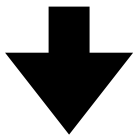
DELIVERY

DEPLOYMENT

DECLARATION

Customer Lifecycle Stages

PURCHASE



DISCOVERY

DELIBERATION

DECISION

DELIVERY

DEPLOYMENT

DECLARATION

Marketing Activities

Sales Activities

Work/Service Activities

Support Activities

Worksheet

Customer Lifecycle

- Complete the worksheet as we learn the 6 Customer Lifecycle Phases
- Write down:
 - What you're **doing well** for each phase
 - What you're **going to improve** or start for each phase



DISCOVERY

Phase 1

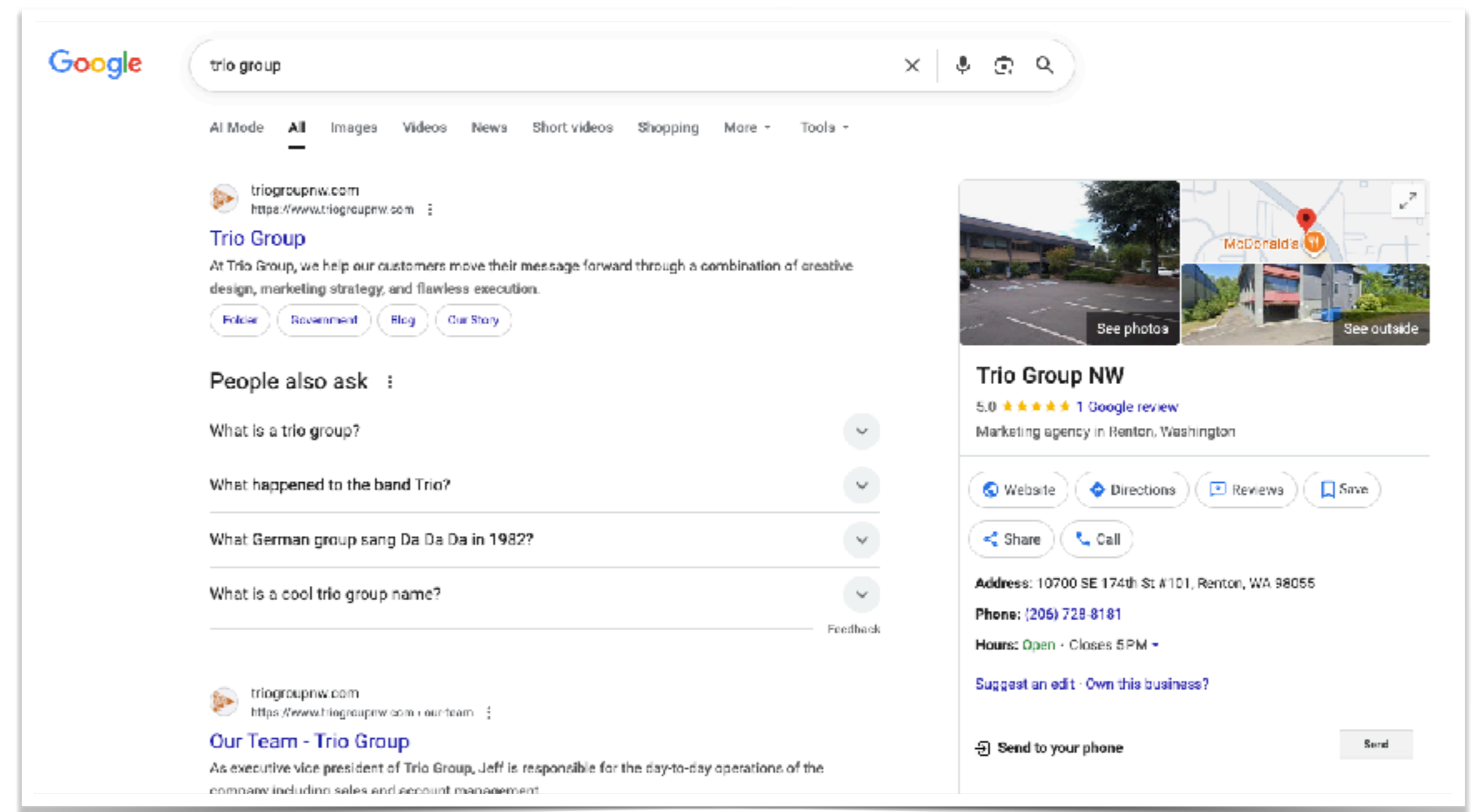
- Prospective client ***discovers*** they have a problem, and that you may have a solution
- **“Where is my ideal client looking for solutions to their problem?”**



DISCOVERY

Phase 1

- **“What am I doing to increase awareness of the business and what we offer?”**
 - Vendor fairs & networking events
 - Associations & memberships
 - Certifications & directories
 - Direct outreach
 - Website & Google Business Profile



DELIBERATION

Phase 2

- Prospective client is aware that you may have a solution to their problem, so they ***deliberate*** whether your business is the best choice among your competitors.
- **“What am I doing to differentiate myself from the competition?”**



DISCOVERY

Phase 2

- **“How can I make it easy for prospective clients to choose me?”**
 - Clear offerings/solutions
 - Marketing materials: website, brochures/flyers, presentations
 - Sales content: fact sheets, FAQs, educational
 - Step-by-step process to working with you
 - Bid responses

DECISION

Phase 3

- Prospective client is ready to make a ***decision*** and commit their resources to a solution.
- **“What are we doing to reduce risk to the client, and facilitate the transaction as easily as possible?”**



DECISION

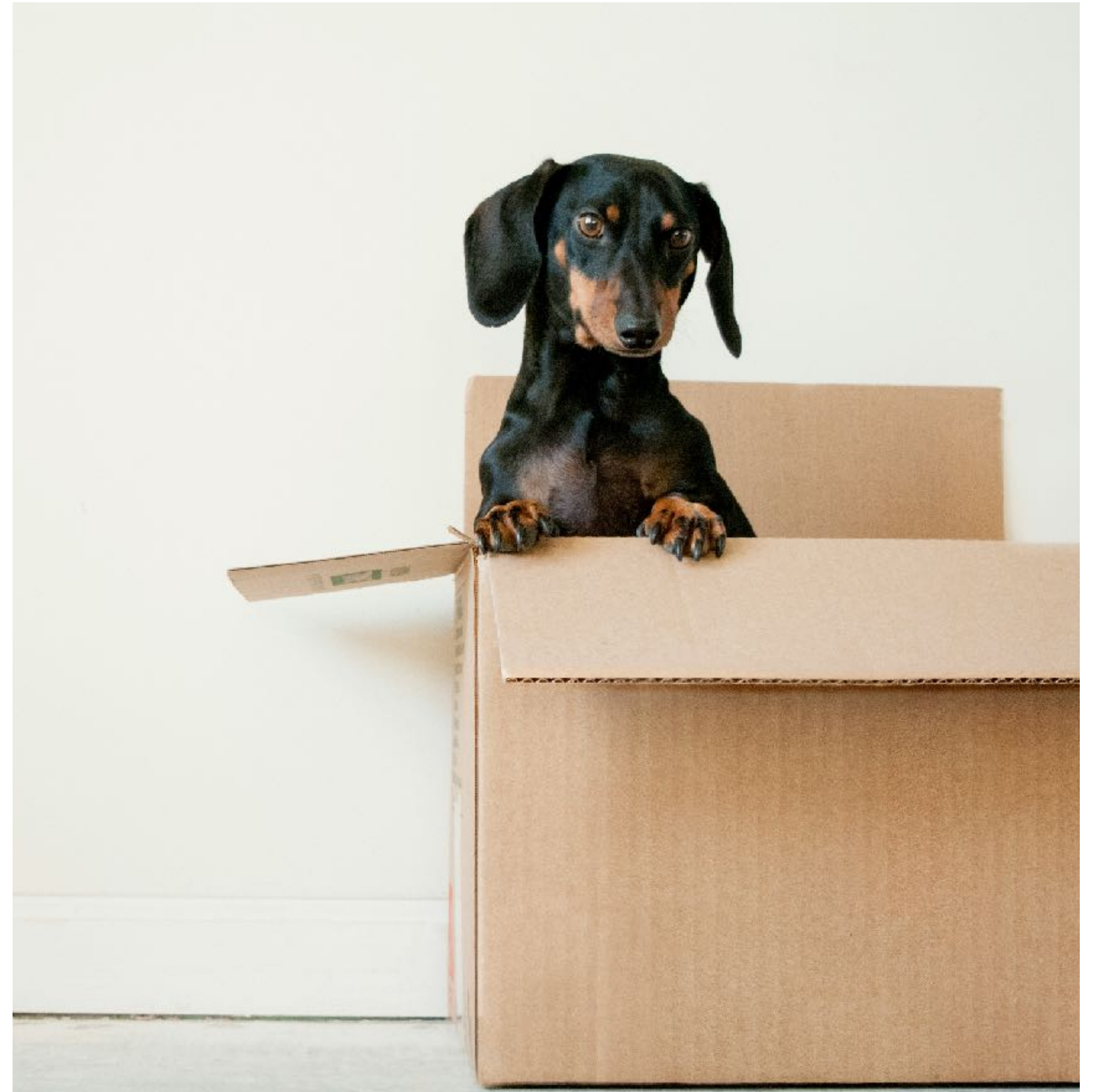
Phase 3

- **“What are we doing to decrease risk and increase ease?”**
 - Certifications & insurance
 - Satisfaction/money-back/on-time guarantees
 - Contingencies/preparedness plans
 - Testimonials & case studies
 - Boilerplate for contracts & terms
 - Streamlined communications & buying processes

DELIVERY

Phase 4

- Prospect ***decides*** to do business with you and has become a client!
- **“What am I doing to communicate the process and manage expectations for the client’s benefit?”**



DELIVERY

Phase 4

- **“How can I communicate clearly and manage expectations?”**
 - Process documents & step-by-steps
 - Pre-written communication templates
 - Project management
 - Capture customer questions and pain points
 - Review and delivery follow-up

DEPLOYMENT

Phase 5

- Client ***deploys*** your product or service and they are actively using or interacting with it.
- **“What am I doing to support our clients in getting the most out of their purchase?”**



DEPLOYMENT

Phase 5

- **“How can we help our clients get the most out of our service?”**
 - Customer support
 - Documentation & user guides
 - Debriefing & follow-up
 - Evaluation/diagnostic tools
 - FAQs & Troubleshooting

DECLARATION

Phase 6

- Client ***declares*** their appreciation and results from your solution to their circle of influence.
- **“What can I do to encourage my clients to share their experience with my business?”**



DECLARATION

Phase 6

- **“How can we empower our clients to share their experience?”**
 - Follow-up evaluation/interviews
 - Case studies & testimonials
 - Social media listening & engagement

Breakout - 5 minutes

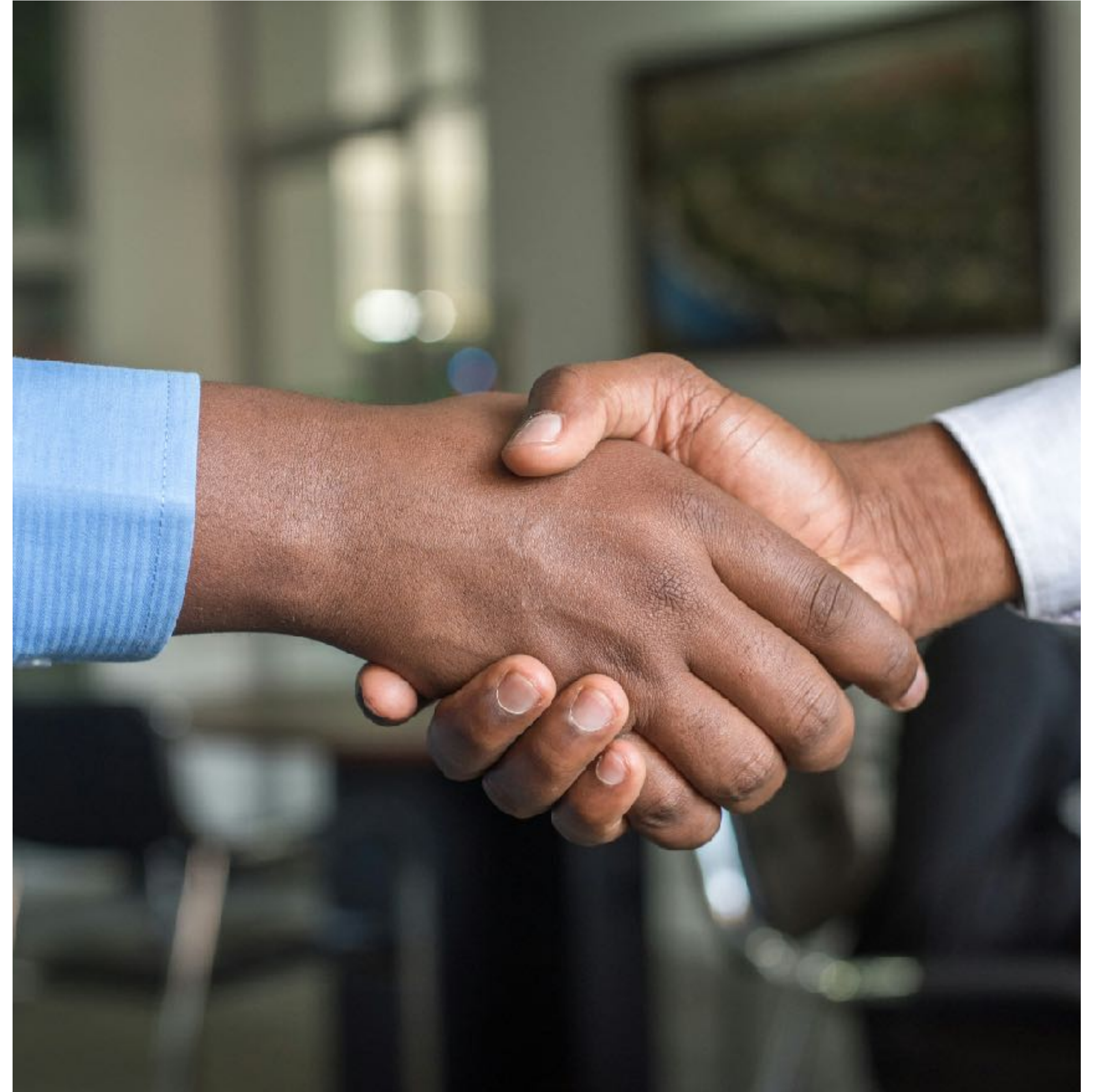
- What's something you're doing well in one of the phases?
- What's something you need help with or want to learn about?



Marketing Considerations for Public Contracting

Understand Your Customer

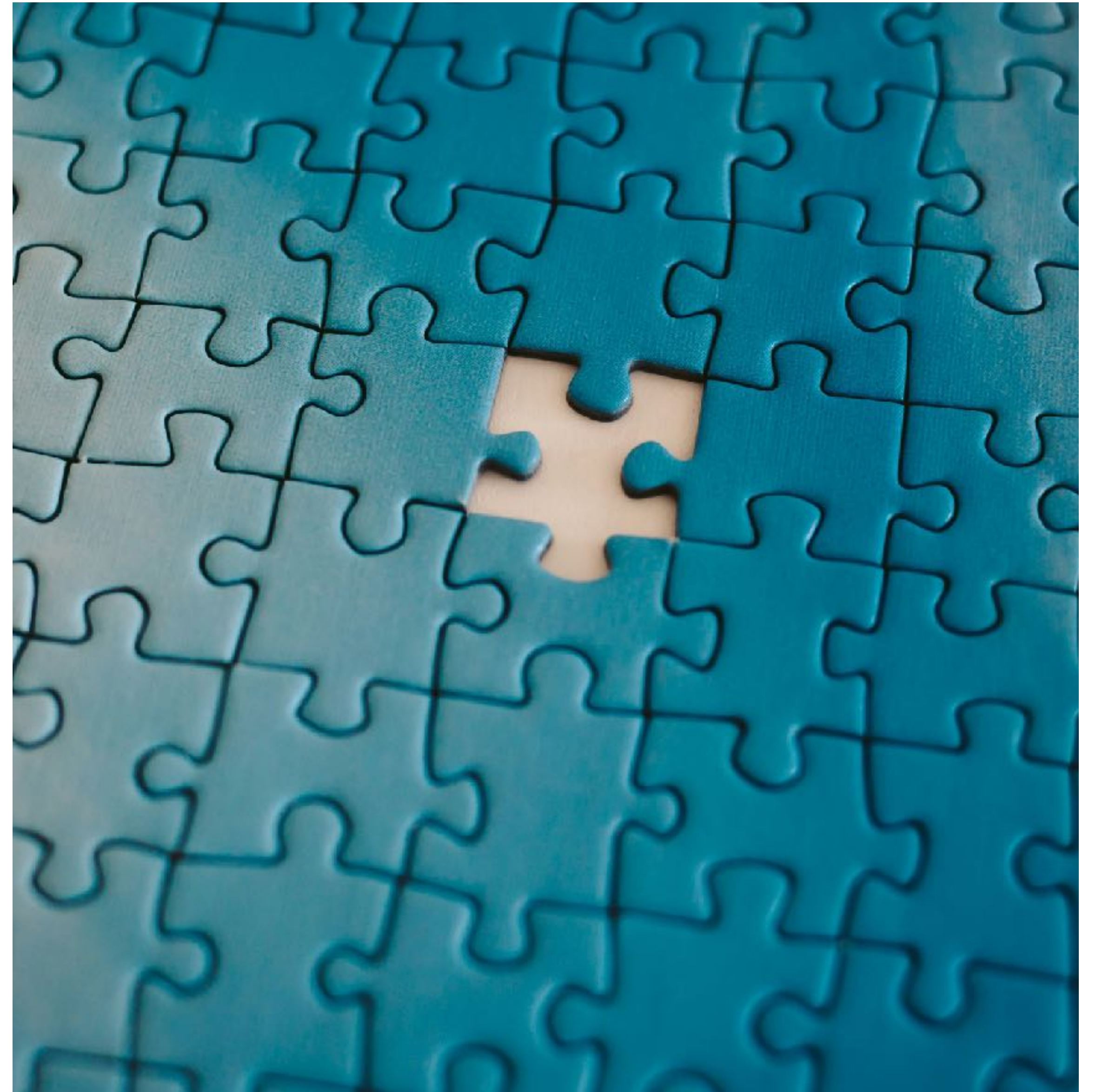
- What are they trying to achieve?
- What have they purchased in the past?
- How much do they typically spend?
- What does procurement look like?



Solve a Specific Problem

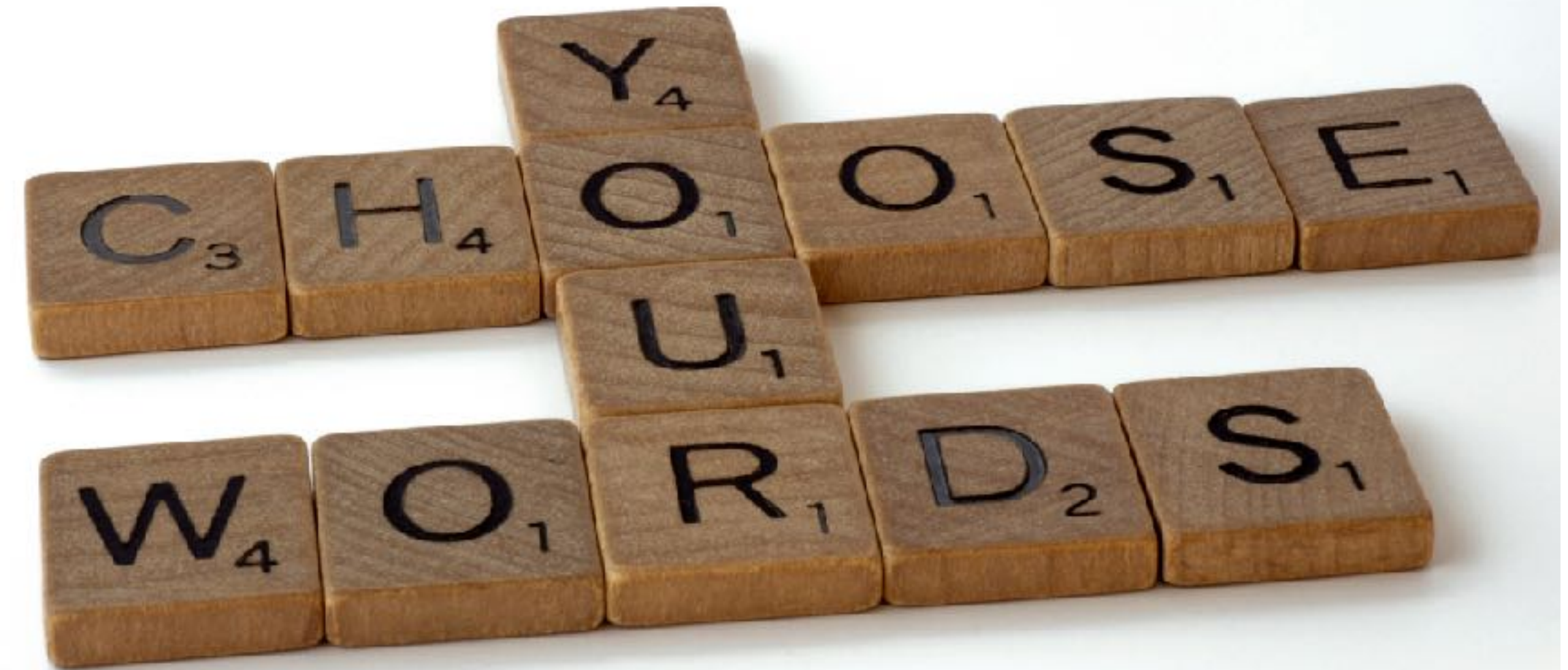
*“Different is better than better” –
Sally Hogshead*

- The Problem with Generalists
- Be the Guide with the Plan
- Differentiators that Don't Matter:
S,Q,P
- How to Stand Out: A,A,A



Use Clear & Direct Language

- Avoid Jargon
- Make it Tangible
- “So That...”
- Logical & Emotional
- Alignment



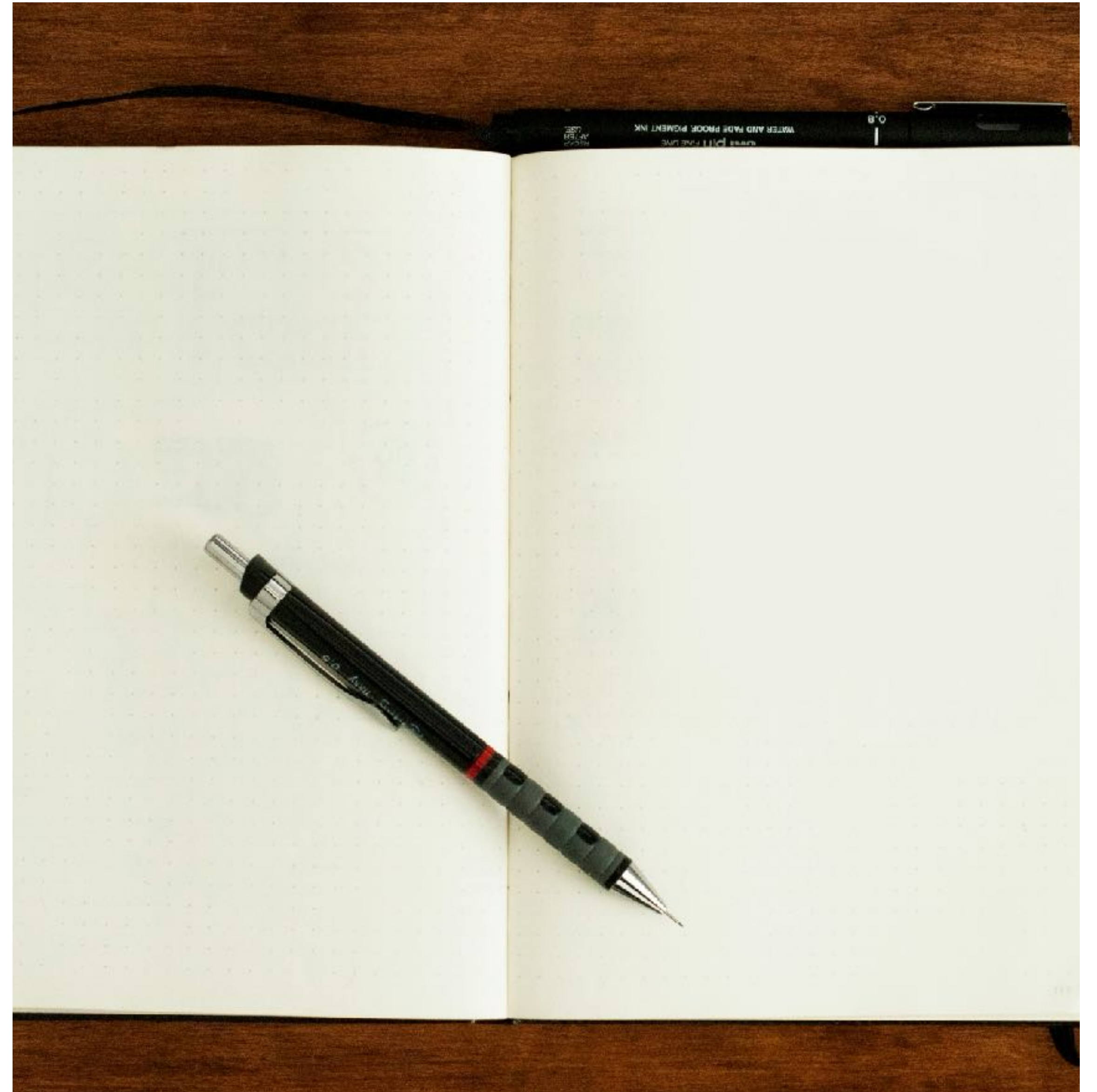
Q&A

Marketing Strategies

Worksheet

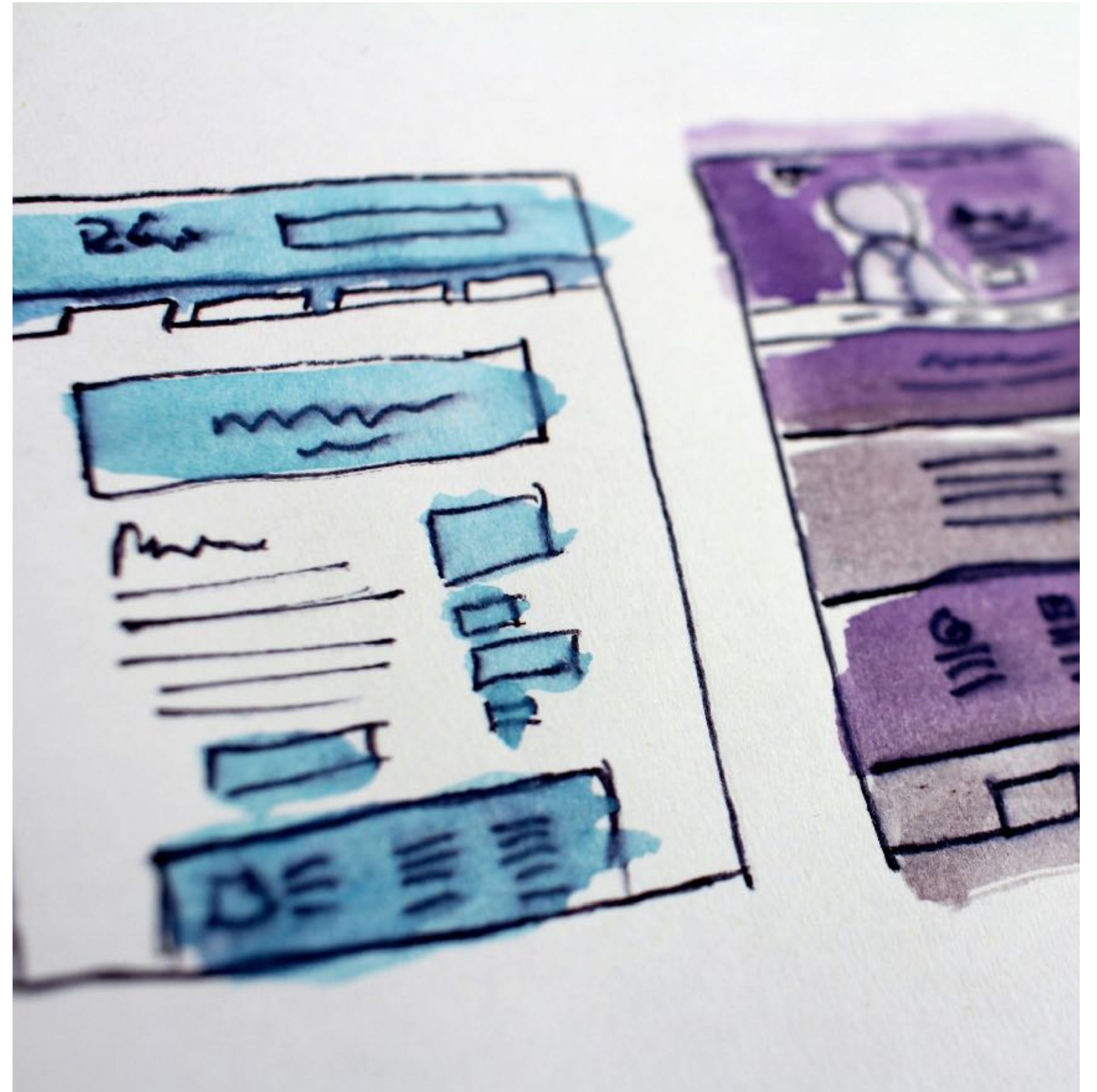
Marketing Menu

- Identify which stage of the lifecycle is ideal for each strategy
- Identify your top 2–3 strategies to implement this quarter



Baseline Strategies

- Website
- Capabilities Statement
- Vendor Database Registration
- Case Studies/Portfolio



Intermediate Strategies

- Direct Outreach
- Respond to Bid Requests
- Vendor Fairs & Procurement Events
- Referral Program



Advanced Strategies

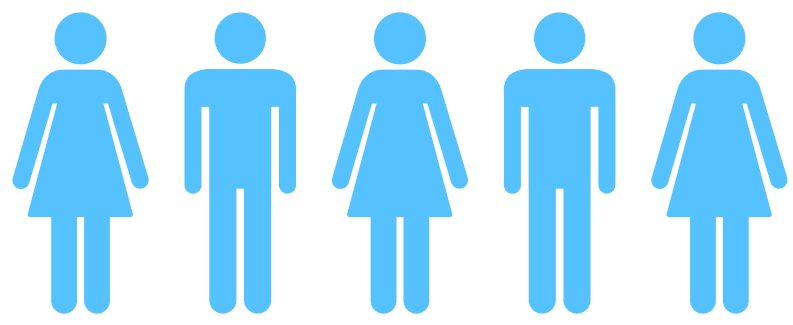
- Email Marketing
- SEO & Content Marketing
- Social Media
- Ads: Online & Print
- Masterclass/Workshop
- Consult Calls



Q&A

Marketing Campaign Development

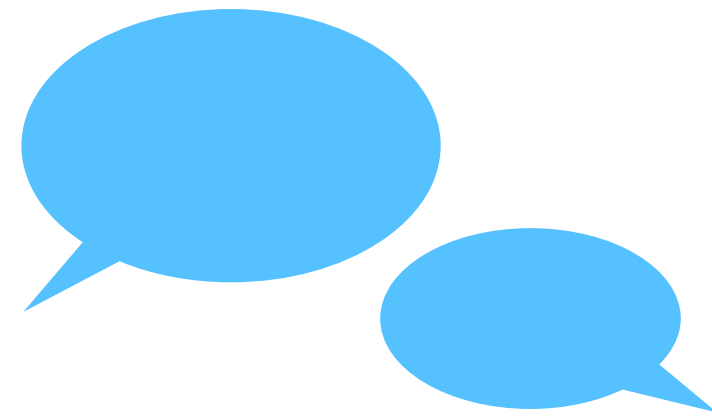
Anatomy of a Marketing Campaign



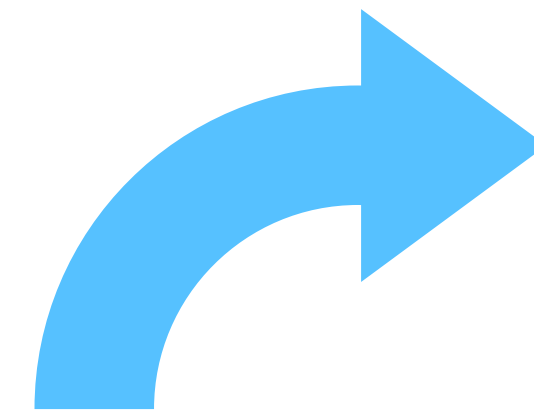
Audience



Goal



Message



Channel(s)

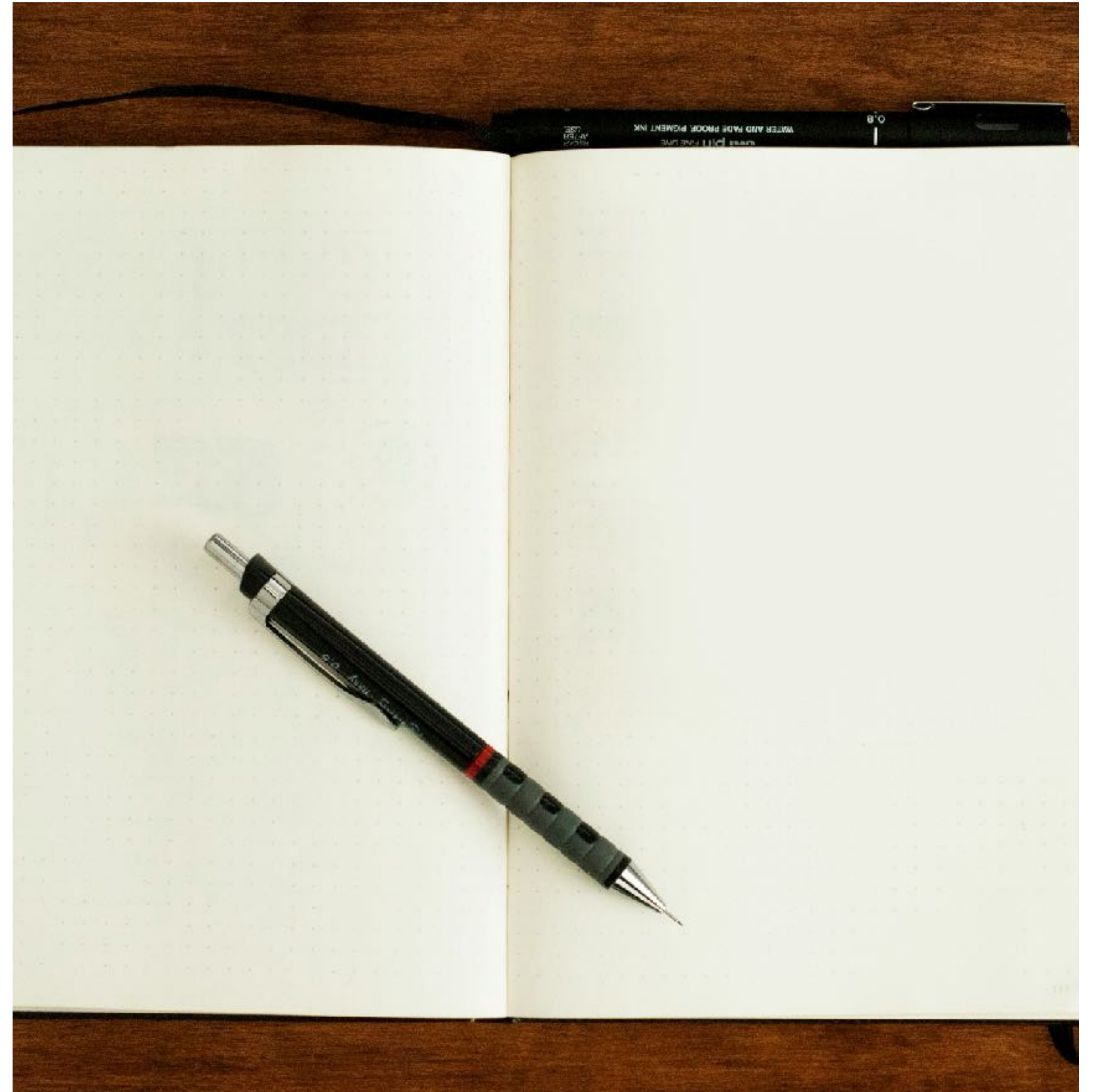


Process

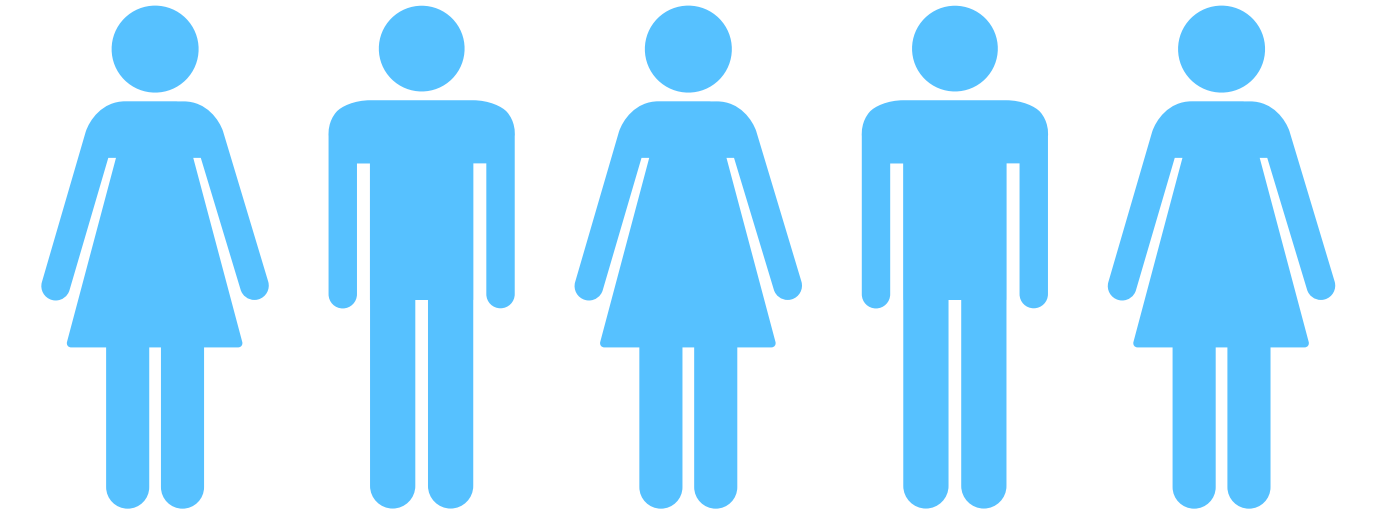
Worksheet

Marketing Campaign Planner

- Choose ONE strategy or outcome you want to accomplish in Q4.
- Complete each section as we progress through the plan.



Audience



- What are they trying to achieve?
- What problem can you solve for them?
- Where can you reach them (online & off)?

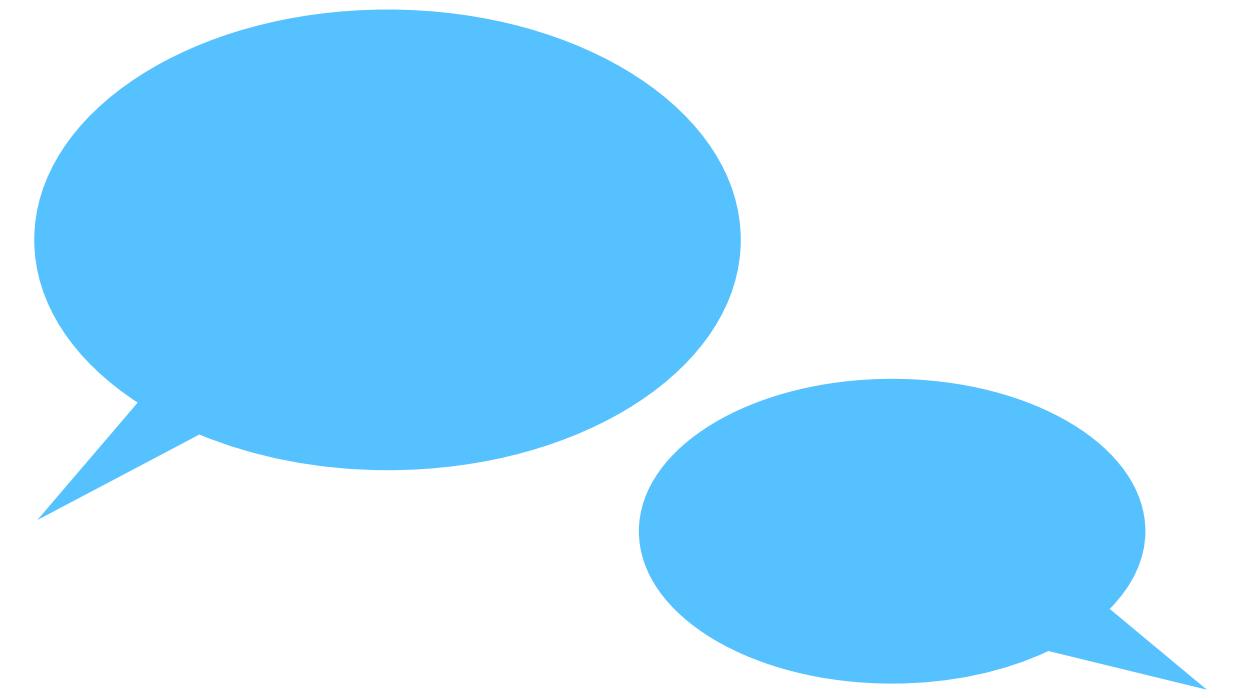
- Example: General Contractors who are working on projects that require environmental testing and remediation. Our new testing equipment speeds up the process, helping the project stay on time. We can reach them through associations and trade groups, direct outreach, and LinkedIn.

Goal



- What are the measurable outcome(s) of your campaign?
- Tangible vs. Transitional
- Example: 1 new testing project booked (tangible), 5 presentations/pitches delivered (transitional)

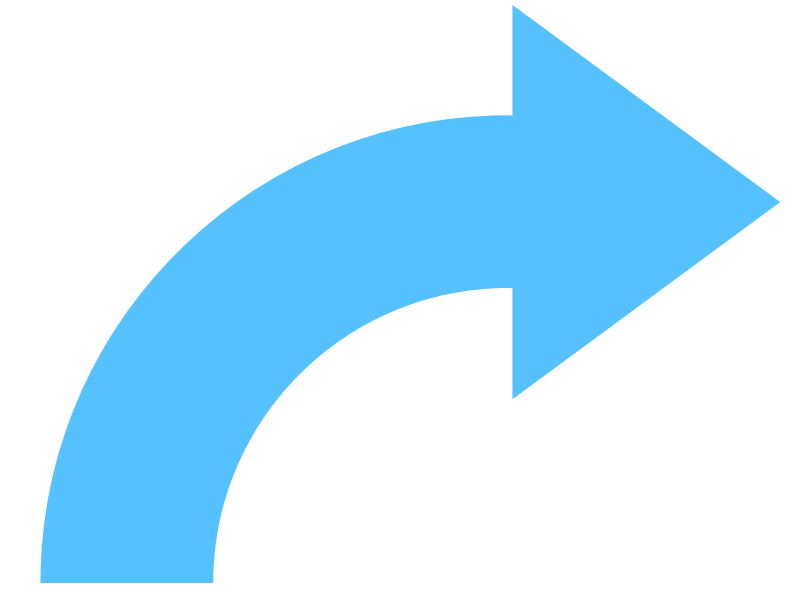
Message



- What are we offering?
- How are we different?
- How do they engage with us?

- Example: Highlight modern testing equipment and the turnaround time it offers clients. Story of time saved for Acme Builders project last spring. Include main phone number in all materials.

Channel(s)



- How will we reach our audience for this campaign?
- What will the frequency be on each channel?

- Example: Attend winter AGC Meeting in Tacoma, direct outreach via follow-up calls, post on LinkedIn once per week.

Process



- Map out each step of how you'll take the audience to the sale
- Who is responsible for each step?

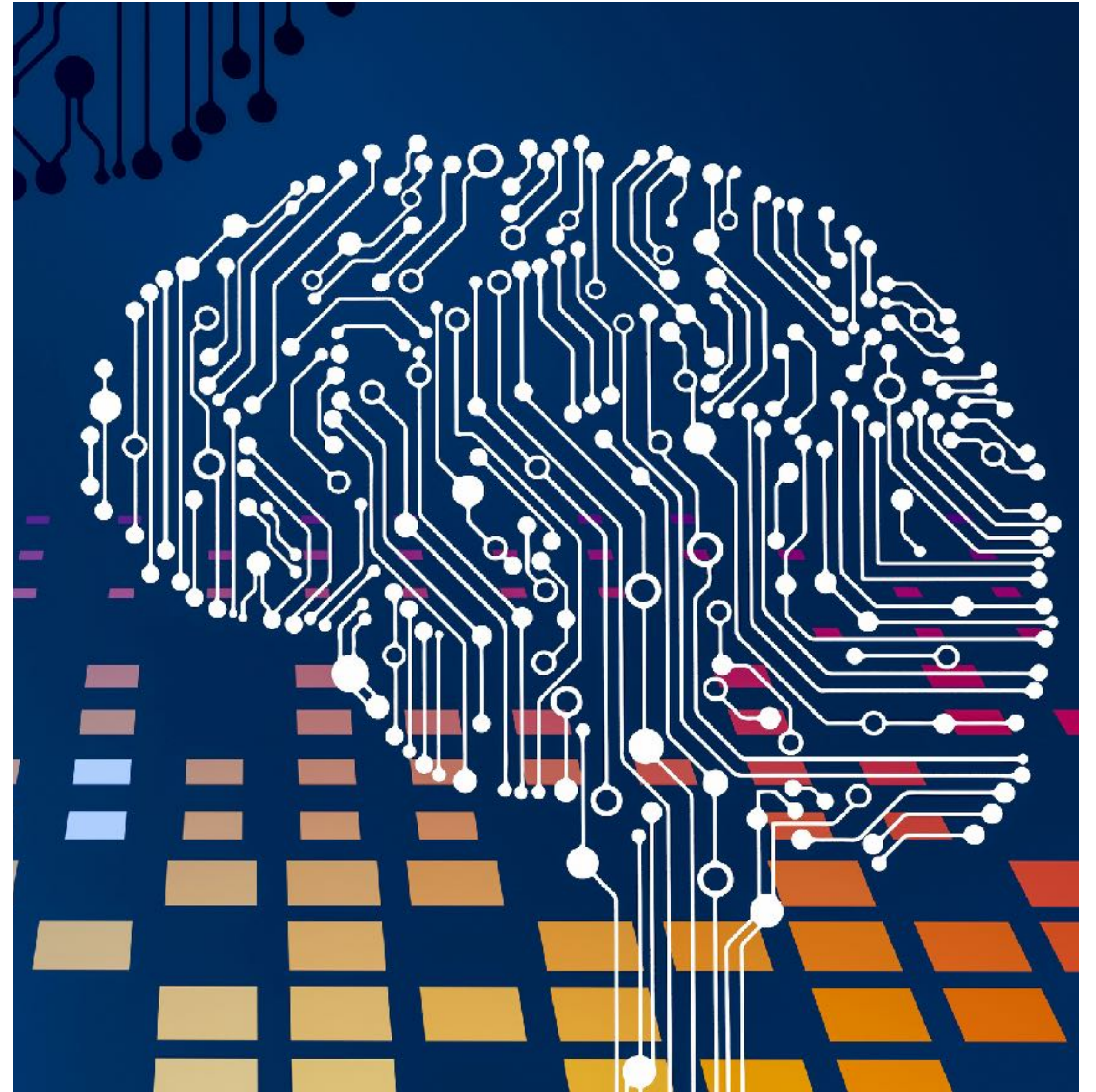
- Examples:
 - GC Meeting for networking > Follow-up calls asking to share testing 1-pager > Pitch meeting > Contract
 - LinkedIn post > Website page for testing services with email capture > email follow-up

Q&A

Artificial Intelligence for Business

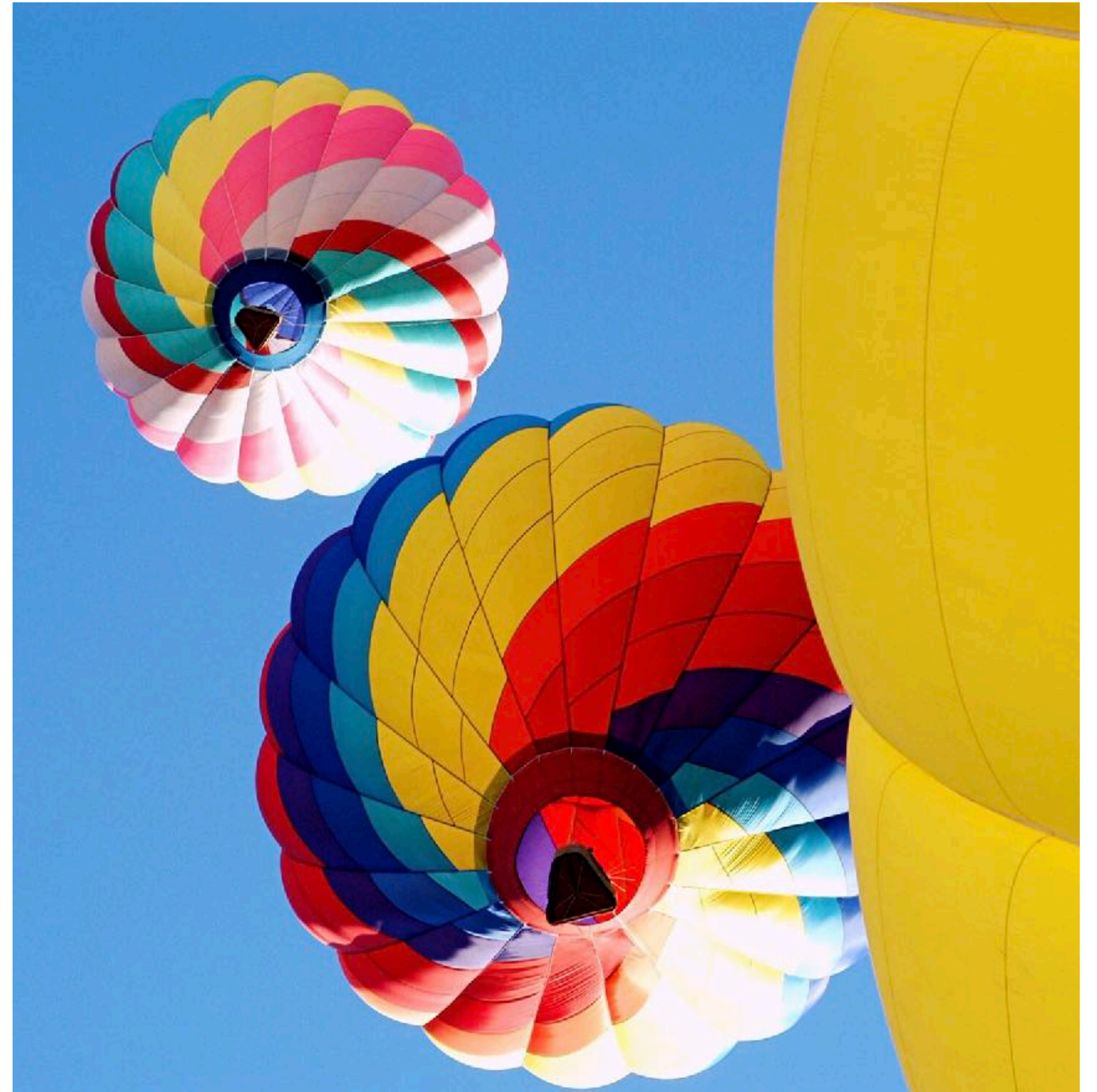
Considerations for AI

- Treat AI as a virtual assistant
- Double-check its work
- Use tools that give you the most control
- Consider data handling
- AI strengths: brainstorming, drafting, summarization, analysis



Tips & Tricks for AI

- Give it a role (“I’d like you to act as a procurement specialist...”)
- Start with an outline or process
- Work in sections
- Correct & adjust as you go
- Ask it to review its own work
- Ask it to help you brainstorm/
prompt



Recommended AI Tools



- claude.ai
 - Designed for writing, reasoning, research, analysis, and coding.
 - Can be instructed to only consider a project's documents, minimizing hallucinations and incorrect facts.
 - Research mode can be directed to specific sites or authorities, maximizing efficiency and returning more relevant results.

AI Use Cases & Efficiency Boosters

- Capture/Summarize Meeting Notes - Claude - claude.ai
- Create Process Documents - Scribe - scribehq.com
- Correct grammar - Hemingway - hemingwayapp.com
- Transcribe video/audio - Temi - temi.com
- Convert written words to text - Claude - claude.ai
- Help you respond to bid requests - Claude - claude.ai

Q&A

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