Perfect pitching

*Winning business gets tougher each year as more players crowd into the lucrative professional-services market. **Jo Oliver** and **Tony Scott** spell out what they've learned about crafting successful proposals.*

Whenever clients in any field are asked in surveys why they pick one professional adviser over another, two criteria float to the top of the rankings as reliably as the froth on a pint of Guinness. In order, they are:

- **'They (the advisers) understand my business.'**
- **'The quality of their people (meaning "I like them").'**

Leaders - and especially founders - of consultancies and other professional-service firms tend to be pretty good at conveying one or both of these attributes, in meetings and in proposal documents (sometimes also called responses to tenders). It's usually why they felt emboldened to set up in the first place.

But their skill may be instinctive and intuitive (and thus largely invisible to them). So it may be of relatively little help to others. The resulting pattern typically is of the leaders' workload increasing exponentially as the firm grows, and of their increasing frustration at the apparent inability of staff to achieve comparable results.

The trick of course is to find a way to codify the critical success factors in the proposal-generating habits of the firm's best business-getters, in a fashion that can be understood and adopted by others.

Some of the factors will be specific to the nature and shape of the individual business. But others are of more general application. The following thoughts, derived from our own proposal-writing experience and mistakes over the past ten years, attempt to capture these more general principles. They represent a default setting - to be broken or ignored only if the client explicitly asks for something different.

How not to do it

First, let us clear some underbrush from the subject, because much orthodox thinking about proposals seems to be as full of holes as a Swiss cheese plant.

The belief, for example, that a bigger job requires a longer proposal falls apart on inspection. Big projects require the nod of very senior people, and the most precious commodity of very senior people is time. Middle managers, desirous of armour-plated defence against a boss, might demand a long proposal even for a small project. Senior managers never do.

Similarly, the belief that clients want to know all about our methodology is rubbish. Clients want to know that they're going to get results. How we achieve those results is much less important to them. As the French author Voltaire put it 250 years ago: 'The secret of being a bore is to tell everything.'

To take an everyday example, imagine taking your car into your local garage to get a rattle fixed. How would you feel if the mechanic began to enumerate his methodology: 'Well, I'm going to take the left front nut off the carburettor, then the left back nut, then....'?

The truth is, you don't care what he does. You care only that he fixes the rattle. The same is true of professional-service assignments.

The underlying reason for the habit is, I suspect, is that our methodology does matter very much - to us. So we just assume that a client will find it equally fascinating. Even though there's not a scrap of evidence to support this view.

The final hole in proposal thinking that's worth plugging here is that clients buy only on price. It may be true that some clients, especially in the public sector, feel obliged to choose the cheapest contender. It is not true of sophisticated buyers.

As to why these beliefs survive, I suspect it's for a combination of two main reasons. First they provide us with comfort, in the form of apparently authoritative rules that we can follow when we write proposals - and, more to the psychological point, that we can blame if the proposals don't win.

Second, they protect us from having to confront the fears that most of us have when we try to sell ourselves. The fear of being rejected by the potential client. The fear of failure in front of our peers. The fear of being judged and found wanting by our organisations. The fear of not being worth our fees.

If we follow the rules, we tell ourselves, we can't be blamed. We'll be safe from criticism.

The fears, like the beliefs, are, of course, thoroughly irrational. Which makes it particularly odd that they should survive in a profession that sells itself on its rationality.

What clients want from a proposal

From a client point of view, any proposal needs to answer - to her, his or their satisfaction, not necessarily the professional's - four key questions:

- **Why should I hire you (rather than someone else or no-one at all)?**
- **What will you do?**
- **Who will do it?**
- **How much will it cost and how long will it take?**

Each question contains an opportunity and a trap. And among the hundreds of professional proposals I've seen, most fall into one or more of the traps. Let me take each question in turn:

- **Why you?**

  The *opportunity* here is to demonstrate clearly to the client that we've understood the business. And the best way to do that is to play back the client's own requirements - ideally in his own words, because they will always speak louder to him than ours - and to show, against each requirement, how we propose to make sure he gets it. That means, of course, that the real work of a proposal begins before we write it - when we meet the clients and learn from them their view of the problem, why it matters to them, and what results, specifically, they'd like from us. The harder we've listened at that stage, the clearer we can be about the business case for doing the project at all and the key concerns we need to address.

  The *trap* is to try to display how clever we are and how much we know. That can lead us into any of three tactical errors. We rehearse at length the facts about what the client already sees or knows (thereby risking him feeling bored). We go beyond what he currently sees (thereby risking him feeling that he or we are stupid). Or we offer a view which is at odds with his (thereby risking him feeling we're wrong). Any one of those errors can cost us the job.

- **What?**

  The *opportunity* is to describe enough of our thinking - in so far as we haven't already covered it in our responses to the *Why you?* question - to convey to the client that we have an

intellectually solid approach which is capable of coming up with answers to the question or questions the project poses.

The *trap* - usually triggered by our own intellectual curiosity and fascination with the project's challenge - is to start thinking about possible answers, and thus to start doing the job before we've won it. We run one of two risks thereby. Either we come up with ideas which are based on incomplete data, and which the client may therefore reject as inadequate (even if we're right). Or we end up giving away good ideas - which are, after all, a professional's stock in trade - for nothing. It may be morally laudable. But business it ain't.

- **Who?**

  The *opportunity* is to tell crisp and memorable *stories* about the project team, on topics and in ways that we judge will demonstrate vividly what each member can bring to that client's particular party.

  The *trap* is to be vague (along the lines of '...a wide range of experience on numerous projects for a variety of blue-chip clients') or to rehearse an entire CV - a literary bludgeon instead of a rapier. We thereby rely on two usually vain hopes: that some part of it will impress the client; and that the client will read it at all. Some proposals contain CVs which run to two or more pages for each individual; they have as much chance of being read attentively as a European Commission directive.

- **How much and when?**

  The *opportunity* is to outline simply and clearly the fees we're asking for - for each phase of a project in turn or for the whole - and the timeframe we propose.

  The *trap* comes in one or both of two forms. First - perhaps because we're nervous about whether the client will accept our fees - we may bury the total somewhere down the section, or blur each step of the process with a blizzard of self-justifying detail. Second - perhaps because we've stopped thinking from the client's point of view - we may work out our costs and add a margin, instead of thinking through (having earlier helped the client to think through) the value to him of getting a handle on his problem and its solution.

  Steer around the risks and grasp the opportunities, and a pretty straightforward template emerges. One which can be flexed to fit varying client styles and circumstances - even abandoned if the client explicitly asks for it - but which can be broadly relied upon to present your case in the best possible light.

How to do it

A solid proposal, we suggest, can be built on seven core principles:

1. Question, question, question.
At face-to-face meetings - without which it is impossible to write a targeted proposal - explore not merely the facts of the client's situation, but the worries he has about it and especially its business effects: for his department and others; for his staff and bosses; for outsiders; for his budget; for his workload; and for himself.

2. Work out the business case for the project.
The client's first decision, after all, is between doing something and doing nothing. That business case forms the introductory section for the proposal - perhaps half a page.

3. Play back what the clients *says* he wants.
Make notes in the meeting of the client's actual words about what he's worried about and, especially, what he's after and why he's after it. Not what you guess he wants, or what you believe he should want. Only one perception matters in the selling situation - and it's not yours.

4. Match each requirement to a specific promise.
Along the lines of: 'You said you want it done by date X.... We'll put as many people on the job as necessary to meet that deadline.' Research evidence across thousands of live sales calls shows that undertaking to match the client's explicitly stated needs not only demonstrates that you were listening. It also correlates *very highly* with sales success.

5. Articulate the process
It makes sense to describe the process you plan to go through in enough detail for it to be comprehensible to the client - and to explain why each step matters, if that's not obvious. But don't labour it. And don't try to guess or give away the answer. You don't know it yet.

6. Introduce the team.
In biographies of team members, or potential team members, aim to tell project-relevant stories about what results she or he achieved, rather than what she or he did. Clients buy output, not input. Pictures, even colour pictures, beside the stories will help to introduce the individuals as individuals, and make your people stand out in a competitive tender. Most professional firms, though not all, are proud of being a collection of talented individuals, not a bunch of indistinguishable clones.

7. Be aware of price fears - especially yours.
In the *Costs and timing* section of a proposal, put fees clearly and early. You thereby show you have nothing to hide. And if the client's budget and perceived value permit, bid high. Perversely, that can help you win. One Big Four firm I was involved with put in a proposal to a public-sector agency based on a job taking 110 man-days. A rival firm which said it could be done in 15 was rejected as having misunderstood the business. The 110-day fee won largely because it showed that the client's worries were being taken seriously.

As to whether this approach works, we checked our own hard disks in the process of preparing this article. In the past five years it turns out we've written some 250 proposals to more than 100 organisations.... on behalf of ourselves and 39 different clients.

A fairly widespread rule of thumb in the professions is that on average you can expect to win one proposal for every five you write. We seem to win two out of three - and, more recently, three out of four.

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