

Chapter 4 **Projecting**

OUTCOMES OF FIRST MEETINGS

As we explained in Chapter 1 when we looked at each of the activities that are needed to build a pipeline of future work, an initial meeting with a Defined Prospect has three potential outcomes. One outcome is that we decide that the prospect is not worth further pursuit. The second is that further pursuit is desirable but there are no immediate opportunities in sight therefore we will have to maintain contact through on-going marketing activities plus e-mail and telephone. The third is that we see an opportunity for work in either the short or medium term and we believe that it is appropriate to begin pursuit of this opportunity.

It is the evidence that we gather at the very first meeting that we have with a Defined Prospect that allows us to make the right decision as to the best way forward. This meeting is therefore critical. It is critical for another reason as well. In our first paragraph we have been very self-centric – *we* will make the decision as to the way that *we* will proceed. There is a danger that we may forget one other important party – the prospective client. She may have something to say about the way forward. Just as we are forming a picture that will allow us to make a decision as to the best way ahead for us, so also is the client. Just like us the prospect is gathering evidence from the very outset – from the very first handshake in the reception area.

As the meeting progresses the prospective client can come to a number of conclusions. For example she may conclude:

- These people seem OK so far so I will tell them about immediate work that they may be able to pitch for. They could be another string to the bow but I won't do anything to enhance their chances over anyone else that I'm talking with.
- These people have really impressed me so far so I will tell them about immediate work that they may be able to pitch for. I'll give them a really good brief and be very open as I have an early feeling that they may be good to work with at some point.
- These people have impressed me but we have nothing on the horizon in the areas that they appear to work in, however I would have no objection to keeping in touch.
- These people are unimpressive and don't measure up to the kind of advisors that we are using today. Even if we have work that their firm could do I don't want to become involved in a discussion with them about it.

Quite clearly we want to make the kind of impression that leads a client to thinking the second option and never considering the fourth.

MANAGING THE FIRST MEETING

Our marketing and follow up has done its job. The Defined Prospect has agreed to a first meeting. A chance now to sell our services! Let's think what may be appropriate. What would they be most interested in? We should start by telling them about ... Stop!!

This is where so many professionals go wrong. They see this meeting as a selling opportunity (right) and therefore their job is to pitch to the prospect in order to convince her that their firm has the services and capabilities that she should use in the future – wrong!

Let's look at it from the Defined Prospect's point of view. She has been on the receiving end of our marketing activities and campaigns over a period of time. One or two things made an early impression so she continued to notice our stuff. She thought that a lot of it was good and mostly it was relevant to her. She then received an intensive campaign and could deduce easily that we were a firm that wanted to make a big impression and that clearly wanted to take the discussion further. When we called her up she said that, based on what she had seen to date, she was open to an exploratory meeting but that we had to realise that she used other advisors for the kinds of work that she understood that we did. We said, "Fine, we would expect that, but let's meet anyway." She said, "OK."

Let's also think what will be in the client's mind the day she decides (hopefully) to appoint our firm to carry out the first piece of work for her. She will have reached the point where she is thinking, "I believe I trust these people with this case and I think my organisation and I can work with them." Now, the simple fact is that most people do not reach this conclusion at the end of a one hour meeting, no matter how well we have managed it. And let's not run away with the idea that handling this type of meeting is something that any professional could do easily. After all don't professionals manage all sorts of meetings all of the time?

On this subject we are reminded of some feedback that we saw quite recently. The firm in question employed a person whose responsibilities embraced some of those that we will examine in Chapter 8 when we look at the role of the Business Development Manager. As part of his role he was responsible for getting feedback from clients and prospective clients on pitches and proposals that his firm had either won or lost. This is his feedback, elicited from one prospective client and given to the professional responsible for pitching to that client.

“I firstly asked the client why they had asked us to pitch. I was told that it was because of our ‘name and reputation’. In addition they had asked [competitor] to pitch, and they were the ones that won.

The first impressions at the pre-pitch meeting were not very good. I’m afraid that they’d decided against you right from the start because of your performance. Whilst they felt that Jane was somewhat more credible they saw Jonathon as being ‘thin’ and he came across as ‘distant’ – as though he had his mind on more important things. They also felt that the team:

- Didn’t really understand their organisation and hadn’t researched them before you showed up
- Didn’t really listen to what they had to say
- Asked and then answered your own questions

Of the proposal document that you sent they felt that this was far too general, full of standards and technicalities and in no way specific to their organisation’s needs. They were looking for a much more focused and specific report.

When it came to the presentation they were really disappointed. They felt that the team was inappropriate given the nature of the proposed work and the nature of the people that they would be working with. The team members were seen as insufficiently experienced and lacking in ‘grey hair’. Whilst the competitors also didn’t do well at the presentation they had a couple of more heavyweight partners on their team and this went down better with the board / management team. They said that both ours and our competitor’s presentation skills were ‘awful’ and wondered if this had something to do with lawyers in general. They said that the presentations were dull and uninteresting and that we in particular made too many incorrect assumptions.”

The proposal and presentation, poor as they were, were a total waste of time and effort. The impression made on the client at the first meeting had, in fact, been decisive.

It appears that some professionals struggle to impress in these early meetings.

Building trust through demonstrating competence, credibility and compatibility

So how do we get a prospective client to the point where she says, “I trust you and want to work with you and your firm?”

- 1 Firstly we must accept that (except in unusual circumstances) this feeling will never be created within a prospective client in just one meeting. The number of contacts required is indeterminate. It will depend on the nature of the client

and the nature of the type of work that we are trying to win. The more 'mission critical' the work or the more it impacts personally on the people giving the instructions the longer the process is likely to take, as there is greater level of trust that needs to be developed.

- 2 Secondly we create trust by demonstrating to the client over a period of time that we have *competence* and *credibility* and that we are *compatible* with her and her business.

Competence

The client deduces our competence by gaining a feel for how much we know about our area of expertise – and how much we know about her type of business and the market conditions in which it operates. She also gains a feel for our competence by our references to previous relevant experiences. Even more importantly she develops an understanding of our competence when we are able to use our knowledge and track record and project this onto her situation – demonstrating real expertise.

Perhaps small wonder then that many professionals are so tempted in a first meeting to convince the prospective client of their knowledge, track record and expertise.

Credibility

Credibility in the client's eyes is built through a number of experiences. People who lack confidence have trouble in building a credible image. Some professionals struggle with this. In their professional environment they may have ample confidence but when faced with a 'selling' meeting this confidence can be left in the car park. There is no point in telling a prospective client, "Don't worry if I come across as a bit flustered and not knowing what I'm doing in this meeting because when you engage my services you'll find I'm a great technician." Maybe it's a failing of clients but they usually find it difficult to separate the two people who share the same suit! They make their judgements on a person's credibility by what they see and hear – whatever the role the professional may be playing at the time.

And prospective clients are quick to make early judgements. Why shouldn't they be? Most of us are the same. The first five minutes of a first meeting are critical. The prospect reaches a lot of interim conclusions very quickly. How comfortable and confident does this person appear to be? How organised is he? How much does he seem to know about what he is doing? What are his social graces like? Can he outline succinctly what he sees as the purpose of the meeting? How much is he interested in me and my agenda – or is he just interested in trying to plough a furrow he's decided in advance? All the telltale signs will be there in the first few minutes and we can be sure that the client will be picking up and interpreting these signs subliminally. Therefore to build credibility a professional needs to know exactly how to open one of these meetings – to know exactly what behaviours to demonstrate.

Over time professionals can also build their credibility by demonstrating two other important behaviours. Number one is honesty and number two is delivering as promised.

Adopting a selling hat does not give professionals licence to behave in the way that archetypal salespeople are portrayed – telling the customer whatever is necessary in order to get them to sign on the bottom line. The vast majority of professionals have an excellent grasp of honesty and honest behaviour as it relates to their professional role. All we are suggesting is that they extend this ethos into their business development activities and never exaggerate or hide an unpalatable fact from a prospective client. The sad fact is that if we are discovered to have knowingly vocalised an untruth then our credibility in the eyes of the Defined Prospect has gone – and so has any trust.

If the selling process is extended over a period of time – as our experience shows that it will be in most occasions – there are ample opportunities for the client to gain first hand experience of our ability to deliver as we have promised. “I’ll get back to you on that tomorrow”, is easy to say but if in hindsight it is not something important, does it really matter if we don’t get back until the day after tomorrow? It’s not important providing the prospect isn’t keeping count – but mostly they are. The prospect is weighing up all the evidence that she experiences that will indicate whether or not we would be suitable advisors to work alongside at some point in the future. She will judge what it is like to work with us by how we are ‘selling’ to her.

Compatibility

If a professional is really interested in demonstrating compatibility to a prospective client then he will be adaptable and adjust the way he behaves. For instance if the client’s nature is to be a little laid back and measured, then the professional should rein in his natural brisk approach and adopt a pace somewhat more akin to that of the prospect. It is human nature for people to like to do business with people they like – and the people that we most easily get on with are people rather like ourselves. There is no suggestion of professionals having to change their personalities. That is nonsense. It is a case of having the interest and desire to observe carefully how others behave and, if necessary, temporarily adjust our own behaviour.

Demonstrating real interest in the client is crucial. Whilst most clients recognise that they need dispassionate, objective advice from their advisors, by the same token they would also like to deal with people that they believe are committed to them, their business and their cause. Good new business developers are curious. They ask lots of questions and don’t accept answers at face value. They dig further to ensure that they *really* understand. This questioning gives the prospect evidence that this advisor is *really* interested – he wants to know all about her business, the things that her part of the organisation gets involved in and about her and her role. He wants to understand

her past experiences, what good looks like through her eyes and what she is seeking in the future. He shows that he is more interested in hearing her opinions than voicing his own.

Linked to being an excellent questioner, a professional who can build compatibility will always be an excellent listener and will have learned the skill of active listening. Active listening is much more than turning our ears up to maximum receptivity or nodding at the right time. It is about giving the prospective client explicit feedback – demonstrating that not only have we understood what the other person has said but that we also understand how they feel about what they have told us. We focus a lot of attention on this skill in *Creating New Clients*.

Compatibility can also be demonstrated by finding small ways to show that we care. For instance we may read in a trade journal that one of the Defined Prospects that we are in dialogue with has won an industry award. Instead of pointing out her picture to a colleague and saying, “I know her!” why don’t we drop her a short e-mail congratulating her. If we see an article in a magazine that addresses a subject that we know one of our Defined Prospects has an interest in, then why not take a copy and send it to her with a short note? Simple acts but all too rare. Showing we care is about demonstrating to a prospective client that we are thinking about her and her business even when we are not in her presence.

Finally it is hard to find too much empathy with a person who is never wrong. No matter what, they are invulnerable! Some professionals wear this façade. In respect of professional work it is critical that any fee-earner seeks to be as right and accurate as he can be at all times. This is part of what the client is paying for. However, this invulnerability should not extend to every aspect of a professional’s behaviour – particularly in some of the more human contacts. People who portray an image of absolute invulnerability at all times are seldom warm, are usually arrogant and at worst are seen as having Teflon shoulders. It’s better to say occasionally, “That was down to me – my fault”, than to always claim that shortcomings are due to others. Demonstrating a little vulnerability helps in building compatibility.

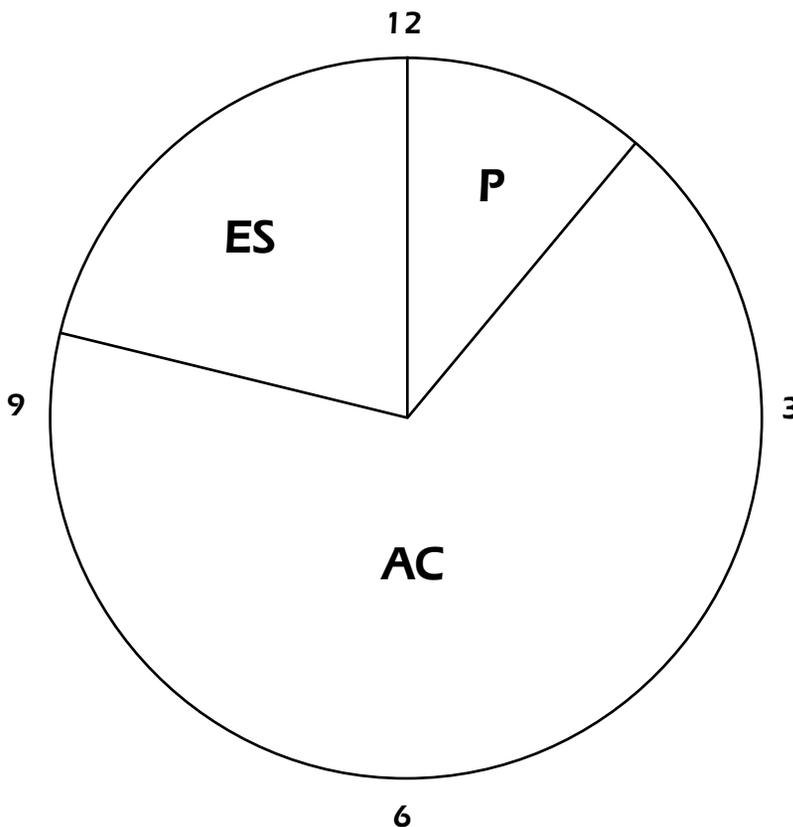
This all sounds like a lot of effort. It is – but let us return to our original premise. Our Defined Prospects are other firms’ clients. Moreover, if our selection criteria are working well they will be the *key* clients of these other firms. The very best of these competitors may have key client plans in place aimed at building the strength of their relationships month on month, year on year. We are going to have to be very good to win work from these entrenched incumbents and to be very good we are going to have to put in a lot of effort. And as a famous man once said, “The greatest opportunities in life come disguised as hard work.”

This takes us back to the concept that we introduced in the previous chapter – we need to treat prospects like clients.

Structuring the First Meeting

Let us assume that we have agreed with the Defined Prospect that for our first meeting we need an hour. Our experience tells us that most prospective clients are unwilling to give more than an hour to an initial exploratory meeting. The exception to this is where the advisor comes with a strong recommendation from someone for whom the prospect has high regard.

How should this hour ideally be used? The hour should follow the PACES process and should be split roughly as shown below. Assume that the meeting starts on the hour.



The elements of the PACES process are as follows.

- P** Position ourselves and our organisation
- A** Ascertain in detail the prospective client's situation and requirements
- C** Confirm to the prospect our understanding of their situation and requirements
- E** Explain or explore a suitable way forward – based on what has gone before in the meeting
- S** Seek commitment to the suggested way forward

‘P’

The ‘P’ part of the meeting is the first five minutes referred to earlier. In reality this can extend to seven or eight minutes but should never be allowed to go on any longer than ten. In these few minutes we are introducing the firm and ourselves, setting the scene and agreeing the purpose and direction of the meeting with the prospective client.

‘AC’

The ‘AC’ part of the meeting should take up the bulk of the time available. It is in this part of the meeting that we are building an understanding of the Defined Prospect’s business today, where it is going in the future and the kind of requirements that she may have of professional firms like our own. We are trying to create a picture in our own mind of the prospect’s needs and wants. We are also developing a feeling as to whether this client and the type of work that she is looking for in the future from firms like ours fits with our aspirations and strengths.

If it looks like this is a relationship that we want to take forward we are also trying to gain information that will enable us to progress our business development activities in the most effective way.

In this phase of the meeting we are listening to the prospective client and prompting her with questions some of which we have prepared prior to the meeting. Not only are we listening but we are actively listening – meaning that we are not coming to conclusions about what we have been told until we have checked our understanding with the prospect. Yes, all this in about 40 minutes!

‘ES’

On the assumption that what we have learned to this point has whetted our appetite to take the relationship further, in the last ten to 15 minutes of the meeting we should:

- Give the prospective client two or three really cogent arguments as to why our firm may be of value to her in the future – based not on generic arguments but related back directly to what we have been told over the past 40 minutes or so.
- Suggest a way ahead – or put a couple of alternatives forward for the client to choose from. These suggestions should meet three criteria. Firstly, they should not be difficult for the prospective client to agree to. Secondly, they should involve the prospect in some form of action – even if it is simply to meet again. Thirdly, they should in some way keep us in direct face-to-face contact with the client and her organisation.
- Gain agreement to the suggested way forward.

In *Creating New Clients* we go into considerable depth exploring the skills involved in executing each of these stages of the initial meeting.

PROPOSALS

Timing

On some occasions the very first meeting with a Defined Prospect will involve discussion about a piece of work that appears to be within the remit and capability of the firm. The AC part of the meeting is very productive for the professional concerned as he probes to find out exactly what the work is and what support the client is looking for from her advisors. In the ES phase of the meeting the professional, based on what he has heard, states why he believes that his firm is well placed to help the client on this occasion and provides examples and offers references to back his assertions.

And then there is a slight pause. The meeting is down to the last five minutes. We're at the time when (the professional wrongly believes) if he were a salesman, he would 'close'. Instead he says, "Why don't I send you a proposal?"

"Great", says the prospect, "that's just what I was about to suggest." Yes, if the professional could have held the pause for only a moment longer the prospective client would have asked him for a proposal. She clearly wants a proposal from him. Both parties, greatly relieved that the awkward little silence has been overcome, smile with satisfaction at a mutually agreeable way forward.

The professional then says, "I should be able to get the proposal to you by Wednesday next week. Will that be OK?"

"That's perfectly OK", replies the client, "there is no particular rush."

By burning the midnight oil and getting his secretary to work overtime the proposal is posted to the prospect on Tuesday evening and arrives on her desk on Wednesday morning. She is not there to receive it as she is in Brussels that day on business and won't be back in the office until Friday. When she returns on Friday her day is filled with meetings. She sees the thick proposal and puts it into her in-tray with the intention of reading it when she has time.

Three weeks later, having heard nothing, the professional decides to give the prospect a call to find out how she feels about his proposal. The call is taken by the prospect's secretary, who briefly puts him on hold and asks her boss if she wants to take the call. The prospect glances guiltily at the proposal still sitting in her in-tray and says to her secretary, "Tell him that I'm in a meeting but that I will get back to him." The first part of the statement is untrue but she has the honest intention of fulfilling the second part.

A week later the prospect realises that it is starting to get close to the time when she will need to make a decision as to whom she will appoint as her professional advisor for the upcoming initiative. She puts time aside in her diary to read the proposal undisturbed. The written document is OK. It is a bit generic in parts but then it was based on only one discussion. It's also quite weighty – which is one of the reasons that it has remained unread for so long. When the professional wasn't sure he opted for detail rather than brevity.

In her mind's eye she tries to bring into focus the face of the professional but she fails. It was nearly a month ago and the week following that meeting she must have met at least 40 new faces during her Brussels trip alone. She recalls that the meeting with the professional seemed to go quite well but the details are very hazy.

With the initiative now firmly on her immediate agenda she picks up the telephone and calls her regular advisor. At the time of calling she thinks, "Why am I calling him? He should be calling me from time to time, but it seems he disappears after each piece of work is concluded." However, she reflects that he is a very safe pair of hands, he knows her organisation and he works well in coordination with her internal team.

A meeting is arranged and this advisor is briefed on the initiative and the work that is required. After clarifying the details of what is needed the advisor asks the client what she needs from him.

"An outline proposal", she replies "four or five pages at the most", (thinking about the hour and a half it took to wade through the first proposal). I know that you can do the work. I really need a schedule of how you would tackle the work, the resources that you would use from both your side and mine and an estimate of costs."

"When do you need it by?" asks the advisor.

"I know it's a bit of a rush but could I have it by Friday, I need to make a decision. Oh, and by the way I'm also looking at someone else for this work."

The advisor weighs up the words and the tone and concludes that in reality this is a one horse race. He can only lose if he falls over and breaks a leg.

A week later the prospect (feeling extremely guilty) picks up the telephone and calls the first professional. She apologises profusely for the time it has taken to get back to him but there were unexpected delays. She thanks him for his proposal and comments on its thoroughness but regrettably has to inform him that on this occasion the company chose another advisor.

"Were we too expensive?" asks the professional, revealing his biggest fear and the factor that he believes is the main reason his firm does not win more new work.

"No", replies the client, "it wasn't an issue of money." As she replies she reflects that whilst her current advisor had clearly made an effort to keep the overall fees down, probably due to the fact that he knew this was a competitive situation, he was still more than 10% more expensive than the first proposal. "We just felt that on this occasion another firm met our needs better."

After the call the professional reviews his meeting notes and the proposal. The proposal is a work of art. It is truly excellent. It covered everything.

"Another client who doesn't know what she's looking for," he concludes.

Flawed logic

When pursuing new work from new clients many professionals are following a flawed logic. It goes something like this. We know from our dealings with clients whom we know well that before they make a decision as to who they will use for a certain piece of work, that they will need a proposal. The proposal (and sometimes a presentation or pitch to support it) come just before the client makes a decision. In our previous scenario the second advisor's experience would support this line of thinking. One usually closely follows the other. The logic is sound up to this point. The observations are correct.

The thinking continues therefore that, when one is pursuing new work, one objective is to get to the proposal stage as soon as possible as this will mean that the client will make a decision (hopefully a positive one) in the near future. Now we're hopelessly off track.

Over the years we have been asked on numerous occasions by clients and prospective clients, "Do you run courses on proposal writing?" We learned a long time ago to answer this question with a question such as, "Why, what is the issue?" Almost always the issue is that the firm in question believes that they are not converting enough of their proposals into work. They may tell us "Our conversion rate has slipped to one in eight."

It may be worth digressing at this point to comment on conversion rates. A one in eight conversion rate is meaningless. If a firm wishes to measure proposal conversion rates it must measure five separate conversion rates. These are:

- Proposals for extensions of existing work and projects.
- New work of the same type that we have carried out for a client in the past.
- New work that we have never carried out previously for the client.
- New work (by definition) for a prospective client where we have proactively identified the opportunity.
- New work for a prospective client where they have approached us to bid.

One in eight does not begin to provide a clue as to where the issue lies.

If the client and our estimate of the potential work warrant it, we will usually suggest an alternative way forward. Rather than quote them for a training course we are willing to come in for a day, spend some time looking at some typical proposals, talk with the people who composed them and try to understand the context in which these proposals were constructed. We agree that once we have concluded our investigations we will meet with the client again to give our feedback. How much will this cost? Nothing usually!

It is interesting to meet the people who buck the trend. Not everyone in our troubled prospective client converts one in eight proposals into work. Some perform far worse. Some perform far better. Some win two in three. We have found that when you ask

these people their secret, the essence of their reply is as follows. “Unless I simply cannot avoid it, I never write a proposal unless I know that I’ve got the work.”

We have never found a case where the proposal problem has solely been the quality of the written documentation, nor a case where this was the prime contributor to the lack of success. What almost inevitably sits behind the issue is a flawed selling process. A proposal on its own cannot win work for a firm. It can only lose it. As David Maister wrote in his chapter entitled *How Clients Choose* in his book *Managing the Professional Services Firm*: “The vast majority of professional projects are awarded at the pre-proposal stage: the formal proposal and / or presentation merely confirm (or destroy) a decision already made. If you can’t afford to spend time, up-front, don’t bother writing the proposal.”

One of our aims in talking in further depth with the people in a firm that has a ‘proposal problem’ business is to understand where the flaws occur.

TAKING THE SELLING PROCESS FORWARD

In the PACES process the ‘E’ part is ‘Explain or explore a suitable way forward’. Hopefully we have killed off the idea that a proposal is a good way forward after a first meeting. So how do we conclude what is a good way forward to which we would like our Defined Prospect to commit? Some information would be useful to help us decide.

An example

Let us take an example of part of the ‘AC’ phase of a meeting. This meeting is between a Human Resources (HR) consultant and a prospective client who is the HR Director of a business. The discussion up to this point has been about the business’s need for help in introducing an appraisal system – creating the system and training people in its implementation and use. The prospective client’s requirements seem to have been quite well explored up to this point.

Consultant It’s clear then that you’ve decided that you need outside assistance with this project. Can you tell me, when it comes to the final decision and you are perhaps looking at the proposals of, say, a shortlist of three or four organisations, what will be the critical criteria that you will use in order to reach your decision as to whom you will appoint?

Client Experience and track record will be vital. We will want to know that the firm concerned has carried out very similar work in a number of businesses that are very like our own. We’d want references to this effect. People that we can talk to. Also we would want the people

who are working on our project to be those individuals that have had that previous relevant experience and success. And of course we would be looking for value for money.

Consultant I'd like to come back to that, but what about your team? You've mentioned them on a few occasions? What do you think that they would be looking for in the people that you choose to work with?

Client Again I believe that they would be looking for relevant experience but also for people with whom they feel they have good chemistry. In addition the consultant's team should be mixed, men and women, to reflect the mix that we have here.

Consultant OK. That's useful to know. And what about you, you personally? What are you looking for?

Client Well I know this is going to be a big project and it will involve a lot of change but as I said earlier we do have something of a process here already. If there are parts of it that we can incorporate into the new appraisal process then I would like to do that. When the consultants are gone it will be me and my people who have to keep the organisation enthused about the value of the new appraisal process and the more we make it totally new and different the more difficult that task will become.

Consultant So you clearly don't want change for change's sake and wherever possible the new process should integrate with the old – if that can be achieved.

Client Right on the nail.

Consultant You said earlier that you were looking for value for money. Now, when we approach projects like this we can tackle them in different ways. One decision we need to make is about how much we use your people and how much we use our own.

One key factor that would help us to shape our proposal with regard to the mix of resources to employ would be the budget that you are thinking of allocating to the project. Can you give me any rough guide to what you are considering?

Client I don't really want to talk specific sums but I can see why you need an idea. The number is around six figures.

Consultant £100,000?

- Client Of that order – a little more.
- Consultant That's fine. That gives me a feel. What does that budget cover?
- Client Everything. From inception to going live. That includes the agreed process and documentation for all the major departments that I spoke of earlier across all of our sites in this country plus the two in Germany and the one in France. The IT obviously has to be included plus translation.
- Consultant Do you have people who could do that translation work?
- Client That would be simple for us.
- Consultant Good. We could look to reduce some costs there then. You didn't mention training. What about training?
- Client No, that comes from a separate budget. Again we've allocated some money here, but this is an area where I would like to make more use of some of my people.
- Consultant So a train-the-trainer approach may be an appropriate part of the solution?
- Client I hadn't really thought about it in those terms but yes, you're probably right.
- Consultant When do you want the new appraisal process up and running?
- Client We'll miss the next round of appraisals – such as they are today. They're meant to happen in a couple of month's time. However I'd like to have the new system running for the next time – which is October next year.
- Consultant So therefore the training we spoke about will have to happen in August and September and the train-the-trainer (if we go that route) would need to happen in July. Allow say three months for the design and implementation with all the necessary documentation and IT element and that brings us back to April. Does that sound right?
- Client It does but April is a bad month for us. It's our year end. We couldn't give this project much of our attention in April.
- Consultant OK. That means a March start with a hiatus in April then. I guess that whoever you work with is going to need four to six weeks probably to

release the right people for the work. That brings us back to early February-ish. When were you thinking of appointing your advisors?

Client We hadn't decided on a specific date but working on that kind of schedule we will have to make a decision by the middle of January. There is a board meeting on Friday the 19th so we'd need to have decided a week before that in order that I can advise the board of what we are doing and whom we are working with.

Consultant It's the 15th of November today, so what will happen in your organisation between now and 12th of January with regard to taking forward this project and coming to a decision as to who you will work with?

Client We need to speak further with our Divisional Directors and flag up that this new appraisal process is now definitely on the way. We've been talking about it for some time and I'm concerned that they may think that this is just more talk and that they won't be ready for the commitment needed – particularly when we get to the implementation and training stages. I'd also like to get a couple of them to be part of the selection process, even if this only means attending the presentations of the short list. They can be a prickly lot so I'd like to get them involved.

Consultant So you are looking for a presentation?

Client We're planning to talk with about half a dozen consultancies like yourselves and invite a number who seem to talk sense to make a proposal. That might be two or three. It could conceivably be six, but that's unlikely. On the basis of the written documents we will then invite some or all of these firms to make a presentation, using the people whom it is proposed would work with us. We will need to schedule these presentations for the 10th and 11th I guess, which means that we will need the proposals for the first day back in January, which is the 3rd.

Consultant You mentioned getting a couple of the Divisional Directors involved in the presentation. Who else would you like to involve in the process?

Client I wouldn't make the decision without also involving a couple of my people who will be heavily involved in the programme. I want to get my HR Manager and my Director of Training, who are both based here, involved in some way or another – at least at the proposal and presentation stages.

- Consultant You mentioned it earlier, so you'd probably expect me to ask. Who else is making up the six that you're talking with?
- Client I'd expect you to ask but I'm not telling you.
- Consultant Can I ask if they're people that you've worked with before?
- Client They're not. We don't make use of HR consultants very often. The people that we're talking with, like yourselves are the kinds of names that you would recognise for this kind of work.
- Consultant That's fine. Just let me confirm again that we are very interested in working with you on this project and I hope that from what I told you earlier of our capabilities and past experience that we will be one of the firms that you invite to propose for this work.
- Client I think that on the basis of this meeting you are safe to assume that we will be asking you to propose.
- Consultant Thank you. Can I suggest a way forward? A while back you said that you were anxious not to reinvent too many wheels – that if part of today's processes could be incorporated into the future appraisal system that this would be advantageous as it would make your life somewhat easier.
- Client That's right.
- Consultant What I am proposing is that a colleague and I spend, say, half a day looking at exactly what you have in place now – the system and the documentation. Perhaps your HR Manager could provide us with a 'guided tour' of what you have now. If we could then spend a couple of hours by ourselves we could formulate our thoughts. Following that, if we could then meet with you for say 30 or 40 minutes we could give you our opinion of where the links could be between what you have today and what you are likely to have in the future. I believe that there would be benefits for both parties here.
This exercise would be helpful for us in putting together our proposal in a way that really fits your situation. I also believe that it would give you an early indication of the level of change that you may be introducing – allowing you to prepare your ground accordingly. Does that sound sensible?
- Client Before I say yes, how much will this cost?
- Consultant Nothing. We view this as part of our due diligence needed to construct our proposal but I am sure that you will derive benefit from the exercise as well.

- Client I'm comfortable with that. I'll speak with my HR Manager and we'll put a date in the diary and organise the day accordingly.
- Consultant If it is possible it would also be useful to spend some time with your Director of Training. It would be really helpful to know how he sees his resources in respect of carrying out appraisals skills training. Once we have a feel for his situation we could also give him some ideas based on our experience in similar situations. Again it's about integrating our approach with the real on-the-ground situation.
- Client OK. We'll try to find a day when they are both available sometime in the next couple of weeks.
- Consultant That would be ideal.

The Value of Commercial Qualification

The discussion above is an example of what is called 'Commercial Qualification' of an opportunity. As the opportunity emerges in the meeting the professional gets a feel for how interesting it is to his firm. It could be interesting for two reasons. Firstly the size of the fee income may make the opportunity interesting. A word of caution here though. The very first piece of work won from a new client is rarely large and if we find ourselves competing for a substantial opportunity against known, proven entities the odds are against our winning. As we pointed out previously, to make a decision in our favour is asking the client to take a big risk.

The second reason that the opportunity could be interesting is that the piece of work on offer may not be large but it may be the entrée into a client that the firm wants to establish a relationship with. Therefore we may be willing to invest disproportionately more in winning the work in order to gain this initial foothold.

The professional wants to find out if there are particular issues that will predicate against his firm's bid for the work or if there are any particular advantages that his firm has that they should seek to exploit. He also wants to know how to position the main thrust of his proposal. He therefore asks a series of questions that are aimed at establishing **the bases of decision**. How will you decide? What factors are important to you and your team?

The professional also wants to establish if the money that the prospective client has in mind is in line with the work and the results she is expecting. Clients are often coy about this subject. The client in our example was less than forthcoming on this subject. Therefore we have to give clients and prospective clients a good reason why it is *in their interests* to provide us with some idea of the money they have to allocate and what they are expecting for this money. Some clients will never tell us their budgetary or fee expectations. The only 'crime' is not to try to find out.

A participant on one of our workshops who worked for a technology consultancy told us of a piece of work that they had recently bid for. They had had one briefing meeting (at which the subject of money was never raised) and then went back to make a presentation. When they got to the subject of fees they quoted the client just over £100,000 for the initial piece of work. The client's people were stunned! When asked at this point what they had in mind, the reply was £5,000! What amazed us even more was that the consultancy then went back and revised their proposal to £5,000 and the client went ahead with them. Mostly we never get a second chance in situations like this and we are still trying to figure out why the client accepted the second proposal. Regardless, the lesson is that we need to try to understand the **budgets and money** angle.

If at this point the professional is still interested in the opportunity and believes that his firm has a realistic chance of winning, he needs to establish the **timescales** involved. We continue to be surprised by how many clients have a clear view of what they need but have not thought through the timescales. The consultant in our example worked through the timescales in a way that we would recommend. Start by establishing when the client wants the final outcome, then work back from there. That way both parties can agree what time is available between the meeting in which they are engaged and the decision date. Also the client gets an early feel for the likely time that will be required to execute the work in question. Unrealistic expectations can be dealt with very early on.

By this stage the professional is beginning to think of ways that he may best utilise the time between this meeting and the decision date.

However, before he makes any suggestions, the professional needs to understand the likely **decision making process** on the client's side. What will happen on the client's side of the fence over the time period between now and the decision date? Who will get involved and what will their involvement be? Too often professionals pursuing a bid become obsessed with their sales process and forget entirely that that is irrelevant.

What is critical is to understand *the client's buying process*. The real professional knows that he has to tie his whole approach into this if he is to be successful. To ignore it is folly.

As a final raincheck the professional will wish to find out about **alternatives, competitors and incumbents**. In the example above the consultant had presumably, from his earlier questioning, established that this is a real project and that the client is going to need the help of external advisors. Other alternatives are out of the question. He mostly drew a blank on his question about competitors but he will probably conclude that he is up against mainstream organisations and not niche players. The really good news is that it appears that no competitor has that immense advantage of being the incumbent trusted advisor.

It appears at this point that it is a fairly even playing field. Time to change all that.

Once an interesting opportunity has come to light, Commercial Qualification is about understanding:

- The bases of decision – both corporate and personal
- The budgets and money situation
- The timescales
- The decision making process
- The alternatives, competitors and incumbents

'Audience Research'

Neil Flett, who is the author of a book cleverly entitled *Pitch Doctor*, heads up an international consultancy called Rogen. The firm specialises in helping clients to win major pitches – typically pitches where the value of the business is worth six figures or more. Neil and his company found fame in 1993 when they coached the Sydney Olympic Games pitch team (including the Prime Minister of Australia and his Dutch born wife).

Sydney's final presentation in Monte Carlo was stunning and the rest is history. Sydney won the Games and staged the most successful Olympic event of all time. As I sat down to begin reading *Pitch Doctor* I imagined a book packed from front to back on what to do and how to do it in that vital hour or so in front of the client. This wasn't what I found.

According to Flett (and in line with our experiences and conclusions) the critical part of pitching is meeting in advance with the proposed audience for the pitch and finding out what will persuade them toward your solution. He calls this 'audience research' and dedicates great tranches of his book to the subject. To quote Flett from his book, "This is not *an* important part of pitching business – it is *the* important part."

It would be excellent PR and the ultimate accolade for his own business to claim that the brilliant planning, 'choreography' and execution of the final Monte Carlo presentation was the winning element in the Sydney bid. Flett, however, gives huge credit instead to those hard working Australian Olympic bid officials who spent years prior to the final presentation conducting audience research with the IOC delegates who would listen to the final arguments in presentation form and would make the ultimate decision.

Flett's experience has him conclude that "Pitches are won before the presentation – it should be proof that the right choice has been made."

Moving the Goalposts

In one of our clients – who bid for both private and public sector work – the expression 'moving the goalposts' is now part of the firm's language. Everyone understands exactly what it means. In a competitive bid situation one of the questions that the bid

team asks of itself is, "What have we done to move the goalposts?" In other words what have we done in order to change the client's initial brief in order to give ourselves an advantage over our competitors? They don't always succeed but it is always part of their bid process and the practice has seen them achieve some stunning wins.

Returning to our HR consultant and his prospective client, by now the consultant is in a position to suggest a way forward. In his mind's eye he can see five people reading his firm's proposal. He can see the same group of five listening to his team's presentation on the 10th or 11th of January. Right now they are strangers. He wants them there as allies. He wants them to read his firm's proposal and be saying to themselves, "That's *exactly* what I need." He wants them to greet his team on the day of the presentation with warm smiles and first names.

Now, having carried out his Commercial Qualification, he is in a position to suggest ways to achieve this – ways that will also allow his firm to produce a better proposal and ways that will deliver direct additional benefits to the client as well.

What is likely to be the outcome of the day that the professional and his colleague spend at the client's premises? Firstly they will establish a relationship with two key people involved in the decision making process. They will demonstrate to these people that they want to understand them and their roles in this initiative. The questions that they ask, the way they listen, the way they behave and the comments that they make will demonstrate competence, credibility and compatibility. The ideas that they generate for the HR Director and the Director of Training will add value and be welcomed by these people. They will be allowing these key individuals to come to the conclusion that these are probably the sort of people that they would like to work with.

In the discussions with the HR Manager and the Director of Training, they will start to understand more fully the business's current situation and its particular requirements. It is likely that new dimensions of comprehension will be developed and this greater understanding will generate additional ideas. For instance the HR Manager may be keen to not only have the necessary documentation as agreed with his Director but also a tailored 'how to' manual. This would be a guide to which people can refer before they kick off their round of appraisals, long after they have done their initial skills training in how to conduct appraisals using the company's new process. It's an excellent idea.

The consultant, in his follow up meeting with the HR Director, will run this idea past him. This is something his firm is well qualified to produce as part of its solution. Is this something that the HR Director would like them to include as an additional part of their solution? The answer is yes. The ground is tilting. The goalposts are moving. All competitors that received the initial even playing field briefing will now be meeting an out of date specification.

By the time that second meeting with the HR Director happens, the professional will have found a cogent, value adding reason to meet with a sample of the Divisional

Directors. It would be eminently sensible that these are the two people that the HR Director has in mind to be involved in the appointment decision. If it is impossible to meet with these people then the professional will seek agreement to speak with them over the phone. These discussions demonstrate to the operational people that this consultancy is interested in their views and their issues. And, with any luck, the perspectives gained from these discussions will subtly change the initial brief again and give the consultant additional, differentiated ways of constructing his firm's solution. The goalposts are moved even further.

Bidding for public sector work

In our workshops we have been challenged on many occasions with, "You can't do that in the public sector." Very often, before we have had time to respond, someone in the workshop group has come back with, "Yes you can – let me give you an example ...". The fact is that the rules vary. In the worst case situation the rules state that potential bidders are not allowed to contact those who will be making the appointment decision. The bidders can only respond in writing to the written brief.

[As an aside we believe that organisations that behave in this way take horrendous procurement risks. Anything can hide behind a well written document. And the advisors that guide public sector agencies to adopt this method of procurement should be taken out and shot. After all it's our money that they're spending with their blindfolds on.]

At the other end of the spectrum a senior manager within a large government agency once told us, "If, after receiving our Invitation to Tender (ITT) we were not personally contacted by any organisation we had included, we would write them off. We would assume that if all they could do was to respond by cutting and pasting a proposal they were not really that interested in us."

Seems like the rules and the attitudes are different in different places at different times. It is always worth testing the water. Don't assume the worst case scenario because a competitor may ask the question and steal a march – and the business.

The firm mentioned earlier that sets out to 'move the goalposts' was bidding not long ago for a huge piece of work from a significant local health authority. The work was of an on-going nature and was therefore extremely valuable. The firm made a point of taking every opportunity to get close to its prospective client before it came to the time that a proposal had to be submitted. Through this series of meetings it became evident to them that the firm could substantially improve the delivery of what the health authority were looking for but it did mean submitting a proposal that did not match with the tender document. The firm spoke with the prospective client who quickly saw the merit in their ideas.

The authority agreed that the firm could submit a non-compliant bid providing that they also submitted a compliant bid. What the internal rules of this health authority's procurement were, is uncertain. However, they were the only firm allowed to submit a non-compliant bid. In the end, due to the very size of the business the health authority split the business between two firms. Our client was one of those that walked away with the joint first prize. All this may seem like a lot of work but £400,000 a year is probably worth a little more effort than normal.

THE TROJAN HORSE

The offer by the HR Consultant to spend time with the HR Manager and the Director of Training was a classic implementation of the tactic we call the Trojan Horse. The principles behind the Trojan Horse tactic are:

- It is a gift that provides benefit to the client or prospective client.
- The gift must be clearly and tightly defined and agreed. It is not an open ticket to free advice and services from the firm.
- It allows us to reach parts of the prospective client's organisation and decision making process that we would not otherwise have opportunity to access.
- There must be a *quid pro quo* for us. We must also derive benefit from the activity.

On the first point the HR consultant did not say, "I want to come in and talk to some of the main decision influencers." He gave the client explicit reasons why meeting with these people would deliver benefit to the Director of Training and to the HR Director himself.

Related to the second point the gift was clearly scoped – two people for one day and verbal recommendations emerging from these 'insight' meetings.

Thirdly, the meetings allowed influential contact with two people who otherwise may have remained in the background until the final presentations. Also the interaction would show the consultant and his colleague engaged in something close to their 'working role' – creating the opportunity for the client's people to 'judge what it is like to work with us' – the concept that we introduced in the previous chapter.

Finally, the consultant knew from his previous experience that this investment of time was likely to provide substantial payback.

It is probably clear now why we referred in the previous chapter to Michael's offer of surgeries as a good example of a Trojan Horse. The Trojan Horse can be used as part of our Contact Marketing or it can be a very powerful element in our business development activity.

But is it ethical?

Before anyone begins to think that this is all to do with knavery and trickery we should emphasise one point. None of these tactics are designed to disadvantage the prospective client. Indeed quite the opposite. They are designed to produce a better offer for the prospect. We have no time for tricks and cons pulled at a client's expense. Not only do we take an ethical position on this issue, we also believe that in the long run it is bad for business. When tactics are employed at the client's expense the client is almost certain to find out at some point that she has been taken advantage of or duped. And that is the end of the relationship.

Bearing in mind all of the above we *are* definitely attempting to disadvantage our competitors.

IMPLEMENTING THE LANCHESTER CONCENTRATED ATTACK

We do not know what activities preceded our HR Consultant's initial meeting with his prospective client. This meeting may have been part of a Lanchester approach and the meeting therefore represented an important part of Stage 7 – On the Ground Spying (see Chapter 2).

If this was so then the HR Consultant was taking a risk in the first face-to-face meeting with his Defined Prospect. To have such a discussion and to only field one person is a situation that should be avoided. The HR Consultant should have taken along a colleague of a similar position and stature to himself. If the chemistry between one person and the prospective client is not good initially, then there is an alternative. Also having two people in a meeting means that there are two pairs of ears to pick up any subtle points that one person may miss and after the meeting there are two informed brains that can work out how to try to take the relationship forward. Having two credible people at the meeting also sends out a signal to the prospective client that the firm is serious about wanting to work with her business and has significant, meaningful resource to deploy.

Let us assume that this is a Lanchester approach (solo first meeting mistake aside). On returning to his office the HR Consultant sends a short e-mail to all of his colleagues on the 'task force' team assigned to this Key Defined Prospect. He gives a brief outline of the meeting and the opportunity he has unearthed. He suggests that Stage 8 (Yes / No Decision Point) is a formality. The prospect looks just as good from the inside as the outside and, in the reasonably near future, there is the prospect of profitable work for which the firm is well suited. He advises his colleagues that the prospect is committed to a next step but he would welcome their ideas at a Lanchester team meeting as to how they should be seeking to use the next eight weeks in order to position themselves as favourites for the work.

The ideas that could be generated at that meeting may include things like the following:

- Meet with the Divisional Directors in order to gain an on-the-ground, 'operations' perspective on the need for a new appraisals process. Understand their views and concerns and demonstrate to them that their input will influence the firm's final proposal submission.
- Invite the HR Director (and possibly his colleagues) to any suitable seminars, workshops or round tables that the firm is running over the next few weeks.
- Invite the prospect's team to an appropriate corporate hospitality event. Try to ensure that this is a small scale and reasonably intimate event with possibly a few really well disposed clients also in attendance.
- Encourage the prospective client to take references early. The HR Director said that this would be a critical part of their decision making so don't leave it until the end or be reactive. Invite the client to go along to appropriate businesses where the firm has had similar successes – to see the system in operation and to talk with people with whom the firm has worked.
- Fix a separate meeting with the Director of Training to discuss the potential shape of a train-the-trainer programme. Ensure that the firm takes along a training expert with a proven track record in this sort of work. The training expert should be armed with some examples of previous work carried out for other clients.
- Set up a meeting with the HR Manager to talk further about his idea for a 'how to' manual. Take along a colleague who has experience of writing this type of document and bring examples of previous work that will help to stimulate discussion and clarify the HR Manager's thoughts.
- Having met with the Divisional Directors try to agree a next contact point with them in order to keep dialogue going.

We know that not all of these ideas will work in this particular instance or will be accepted by the prospective client – but they do provide the ammunition for the Stage 9 – Concentrated Attack – phase.

RESPONDING TO TENDERS AND PITCH OPPORTUNITIES (BLUEBIRDS)

Defining Bluebirds

One of the downsides of being well known within a particular professional discipline is that a firm may be asked by all sorts of prospective clients to bid for their work. The

post is opened one morning and in it we find an Invitation to Tender or an invitation to pitch the firm's capabilities at a 'beauty parade'. And what is wrong with that, many professionals ask us? In sales parlance these unexpected opportunities are known as 'bluebirds' – pretty creatures that 'fly in through the window'. However, not all feathered creatures are bluebirds. Some are emus – birds that will never fly. Some may be albatrosses – creatures we would not want around our neck.

Three examples of bluebirds

Example 1

On one of our workshops a well known and highly respected lawyer gave us the following anecdote. At a meeting with one of her best clients the client said to her that she needed to be aware that they were going out to tender for their future legal work. "They must have sensed by something in my reaction that this had taken me by surprise", said the lawyer. "I was a little taken aback because the work and the relationship were going ever so well – but I had tried to hide my shock. Having sensed my reaction the client quickly said to me, 'Don't worry, there's no problem. We'll appoint you again but we need to go through this process due to our internal rules. Actually, we were wondering if you could help us to write the tender document?'"

The tender document was duly written and went out to a number of firms who must have concluded that this was a nice bluebird as they spent considerable man days in formulating their written responses. To what end? They never stood a chance of winning the work. They never stood a chance of even being taken seriously.

Example 2

This second example involves the public sector. A property consultant who had spent 18 months on secondment to a very substantial central government department's property section told us this story. He had been party to the appointment of a number of professional advisory firms including engineers, other property advisors and lawyers. Our discussion at the time had been on the subject of procurement processes and in particular the use of Decision Matrices. (A Decision Matrix is a tool that has the names of bidding firms down the left hand column and a number of important Bases of Decision criteria along the top, with certain criteria having different weightings. The aim is to score each bidder on a one to ten scale on each of the criteria. Once the mathematics are worked out then the winner is the firm with the highest score. Nice and objective – and provides an audit trail as to how decisions were made and how firms came to be appointed.)

Looking a little askance the property consultant opined, "I'd be a little careful about taking these decision matrices too seriously. What I observed and what I took part in at (Government Ministry) didn't quite work that way. What tended to happen was that when we knew who we preferred to work with, we scored the decision matrix accordingly!" So much for the even playing field!

He told a specific anecdote about one appointment of lawyers. There was a lot of ongoing work from this ministry so the work concerned was highly prized. The ministry, with a lot of input from the seconded property consultant, created an Invitation to Tender. This was sent out mainly to major London law firms that had a reputation for real estate expertise.

“The firm that came last,” said the property consultant, “we never heard from until their written document landed on the mat at the eleventh hour. In addition to the proposal all of the firms also had the chance to do a one hour pitch but they had to field the team who would carry out the work. On the pitch day this team turned up led by a Senior Partner. A seemingly aloof sort of fellow, he introduced his team. They said ‘Hello’ and then he proceeded to deliver the whole presentation. At the end he fielded every question and his team concluded their contribution by saying ‘Goodbye’. It wasn’t hard to find the appropriate scores.”

“The team that won took a totally different approach. When they received our ITT one of the Partners gave my boss a call. He said that his firm was really keen to win this work but that, as good as the ITT was, there was lots of detail that they would like to bottom out in order to really understand the brief. Could they come in and talk with us? My boss said, ‘Yes’. It transpired that one meeting led on to another and then another. The first partner was involved in them all but other lawyers also participated in some meetings. A few of our team got involved in these discussions and we got to know these lawyers. They were nice people. Don’t get me wrong, they were good property people but we also felt comfortable with them and whoever the ministry appointed there would be an on-going relationship over at least a two year period. Their proposal was a good one – more in-depth and specific to our needs than most of the others and their pitch again reflected the work they had done up front. Also they made use of all of their whole team in the one hour, most of whom we had already met. It wasn’t a difficult decision. We put the appropriate scores on the doors and we chose the people that we liked – again.”

Example 3

Contrast example 2 to the experience of a group of lawyers from a well-known London based firm with international capabilities. A partner told us of the following experience.

“We had received a written Invitation to Tender from a German company. They are a global concern and would be a dream client for us. We were told that there would be two significant interactions in the bidding process. The first was a two hour face-to-face briefing meeting at their headquarters in Germany. At this meeting we could ask any questions that we needed in order to construct our pitch. The second was the pitch itself – a couple of weeks later, again at their HQ. Just before the first meeting was due the client cancelled. They said that they didn’t have time to see us. They had other priorities but they still wanted us to come along and pitch. We had to put the pitch together based purely on the written document. A team of four of us travelled from London to Germany to make the pitch. It didn’t go well right from the outset. You

could see from their body language that they were not really interested. In hindsight we believe that we were just there to be ticked off the list – in case anyone in the future asked, ‘Did you ask (international law firm) to bid for this?’. We are a very credible name but it was clear that these people did not want us.”

At the end of his explanation the lawyer asked us, “What would you have done, given this situation?” Our reply – “We would have ‘no bid’ the opportunity. We wouldn’t have touched it. Once the briefing meeting was cancelled we would have gone back to the prospect thanking them for considering us but then giving a cogent reason why on this occasion we thought it inappropriate to bid.”

“We couldn’t do that,” responded the lawyer, “our Managing Partner would never allow us to not pursue the chance of winning work from (German company)!”

If that were true then the Managing Partner in question has a strange view of business development and an even stranger perspective on profitability. How much did it cost for four Partners to prepare and deliver a presentation in Germany – with zero chance of winning?

To pursue or not to pursue – the bluebird checklist

We are not suggesting that all ITT and beauty parade bluebirds are a waste of time. However, we know that many are. What still continues to surprise us in so many professional firms is the indiscriminate deployment of resources used in chasing bluebirds that will never fly. A question we often ask is, “Of all the opportunities you receive to bid for work, what percentage do you take up?” To this day this question can be met with puzzled looks and responses like, “What do you mean by percentage? We pursue them all.” As if any other course of action was somehow illogical! How can these same firms claim that they do not have enough resource to dedicate toward those more effective marketing and business development activities that remain stuck on their wish list?

If any firm believes that these messages about ITTs and beauty parades are an irrelevance to them and that they buck the trend, we don’t have a problem with their position. We would only ask that they confirm this belief to themselves by examining their five proposal conversion rates that we outlined earlier in this chapter. However, if a firm recognises these issues – and they are of some concern – then one action that should be taken is the construction of a Bluebird Checklist.

The checklist, an example of which is shown on the next page, enables a professional or business unit head to more objectively review an unexpected opportunity that ‘flies in the window’. Often the answers to the questions may be in the ‘Query’ column. That should be the signal to pick up the telephone and speak with the prospective client or others who may be able to give insight into the answers to these questions. If enough ticks end up in the ‘Unfavourable’ column then the decision should be made not to engage in pursuit of the work apparently on offer.

Example of a Bluebird Checklist

Name: _____ Date: _____

Bluebird name: _____

	Favourable	Unfavourable	Query
Is the prospect in a targeted industry sector?	Yes	No	Don't know
Is the prospect financially resilient?	Yes	No	Don't know
Is probity an issue?	No	Yes	Don't know
Is there any possibility of conflict of interest with existing clients?	No	Yes	Don't know
Has the opportunity arisen as a result of good personal contacts within the prospect? Do those contacts see this as a real opportunity?	Yes	No	Don't know
Is the client likely to be fee sensitive?	No	Yes	Don't know
Is the work likely to provide our minimum profitability or better?	Yes		Don't know
Do we have the resources to pursue and successfully deliver this opportunity?	Likely	Unlikely	Don't know
Is the location of the client desirable?	Yes	No	Don't know
Is the value of the immediate business worth more than £x,000	Yes	No	Don't know
Is there a prospect of substantial follow-up business?	Yes	No	Don't know
Are less than four other competitors bidding?	Yes	No	Don't know
Is the volume of work to get to proposal stage of a reasonable level?	Yes	No	Don't know
Does the prospect have an identifiable and autonomous Decision Making Process (DMP)?	Yes	No	Don't know
Does the prospect have a reputation as a 'time waster'?	No	Yes	Don't know
Is this prospect a big spender on our type of advice?	Yes	No	Don't know

Action taken: _____

On one workshop that we ran, the Managing Director took away the action point to construct his business's Bluebird Checklist. He produced the finished article at a follow up workshop a few weeks later. Initial impressions were that it looked somewhat similar to the example on the previous page. He introduced his work as follows. "You will notice that the first check item is, 'Did we know about this piece of work before we received the tender document or Request for Proposal (RFP)?' The second reads, 'Can we gain access to talk with the client about this opportunity?' Then you will notice a heavy line. The way it works is that if you get a 'No' answer to the first two questions, then don't bother looking at any of the other factors. You will be wasting your time. I have looked back over the last two years and all of the bluebirds that we have bid for. I have to tell you that I cannot find one instance when we have had a 'No' to both of these two questions, where we have ever won the work."

Our own personal experiences (as illustrated in example 1) of having been given clear indications by clients that work is ours and is 'in the bag' before a proposal has ever been submitted by any bidder, must suggest that this happens to others – including our competitors. If this is so then there must be occasions when the pitch has been tilted so far against us that to bid for some work represents poor use of the firm's resources and our own time.

It is time to be realistic, not optimistic.

MANAGING THE PROJECTING PHASE PROCESS

A few years ago when talking with a group of IT consultants on the subject of sales forecasting one of the group said something like: "It seems that those bids where you rate your chances really highly are the ones that you lose and those where you think that you have no chance you end up winning. I can't see the point in trying to forecast!"

It perhaps comes as no surprise to learn that as we explored further we found that the consultants in question had little understanding of what constituted a successful and replicable selling process. Moreover they had never considered the issue that their potential clients went through a buying process – however unplanned and unstructured it may have been. No wonder they had no idea as to which bids they were likely to win. Their forecasting, such as it was, was based on guesswork.

The fact is that people who are consistently successful in selling their services and the services of their firm, do have a replicable process. Selling is not a black art or something to do only with personality. Professionals who discipline themselves to apply the processes covered in this chapter will win in competitive situations more often. It is that simple.

WHERE TO GO FROM HERE

Where to go from here if you run a firm or have overall responsibility for marketing and business development

Ensure that all practice areas and market facing groups within the firm are measuring their proposal success rate in the five different selling scenarios. Examine this information, conclude what it is telling you and then put in place an action plan to capitalise on strengths and address weaknesses.

Ensure that each practice area or market facing group in the firm has a relevant Bluebird Checklist and that this tool is being used to assess unexpected opportunities.

If you have reason to believe that the selling process (and selling skills) of your professionals are not strong, then invest in appropriate training. The best salespeople in the commercial world took years to hone their selling skills and probably attended weeks of relevant training programmes. Don't be fooled into thinking that because professionals are clever that they can learn these same skills in an afternoon. Any skill takes time to learn, practise and embed.

Where to go from here if you run a business unit within a professional firm

Go along to selling meetings with professionals in your business unit to see for yourself the process and skills that your people employ in these types of meetings. Offer coaching and training to your people if your observations indicate that there is room for improvement.

Before you endorse any individual or group within your team to become engaged in hours or days of proposal production, insist that you want to know the answers to the commercial qualification questions.

In your practice area devise your own tailored Bluebird Checklist and use this to examine all incoming, unexpected opportunities.

Within your practice area measure your professionals' proposal success rate in the five different selling scenarios. Examine this information, conclude what it is telling you and then put in place an action plan to capitalise on strengths and address weaknesses.

Where to go from here if you are a marketing or business development professional working with fee-earners

Get involved in selling meetings with the professionals with whom you work. Try to attend such meetings as an observer, not as a participant. This will help you to focus more clearly and objectively on the meeting dynamics. Provide coaching and feedback to the professionals concerned based on what you have seen and heard.

Encourage the professionals with whom you work to spend a few minutes with you prior to their selling meetings to talk through how they are intending to structure and handle the meeting and the objectives they are seeking to achieve. Coach and give input that will help them to be better prepared and organised.

Work alongside your professionals to help them configure the best way to take forward the selling opportunities they are presented with. Ensure that there is not a default action of rushing to the proposal stage.

Push back when you are presented with poorly qualified selling opportunities and weak bluebirds where you are expected to contribute to the proposal compilation. Your role is to help the firm win business, not to engage in fruitless activity.

Where to go from here if you are an individual practitioner within a professional firm

Adopt the PACES process for your selling meetings. It will give you a framework to work with.

When in future you identify an opportunity for work in either a client or prospective client situation, make it a habit to commercially qualify the business. This practice alone could save you hundreds of hours and help you focus on the really winnable opportunities.

On the next occasion when you are pursuing a very attractive piece of work in a competitive situation, make a specific effort to work out ways that you could move the goalposts and wrong foot your competitors.

When a suitable situation arises next, try a Trojan Horse approach. Practise articulating exactly how you will present it to your client before you meet.

