



Pointers

Presentation

A Publication of Dag Knudsen, Inc.

"Grokking" Improves Persuasiveness.

A persuasive proposal's purpose is to help your client select you over your competition. Many factors contribute to persuasiveness: visual impression, organization, easy to understand messages, graphics over words, factual proofs that promises will be met, and grokking. The latter forms the foundation for everything else you do with your proposal.

To grok, "means to understand so thoroughly that the observer becomes part of the process being observed..."⁽¹⁾ or, "showing an understanding of another's position."⁽²⁾ The understanding being on an emphatic level.

Place yourself in your clients' shoes. You are reviewing three competing proposals made by equally competent firms with very similar experience base. What will raise your level of trust in one firm over the other? In one PM over the other? Would you trust the organization which demonstrates they know their own business very well? Or are you more likely to trust an organization which, in addition to their own business, demonstrates knowledge and understanding of **your** business, **your** project specifics and **your** needs? McNeal states in his article that the questions almost answer themselves. "Why would anyone trust judgments based on one-sided understanding?" Research verifies that trust is a significant factor in decision making⁽³⁾. Thus the effectiveness of your proposals and presentations are greatly improved when they contribute to-

raised levels of trust. So, instead of presenting your proposal from your perspective only, demonstrate your understanding by grokking. In other words, show that you understand your client's position, objectives and concerns as well as they do. Show how your proposal reflects their position, their objectives, and their concerns. Then, establish credibility of your offering. You do this by referencing similar past projects/situations and explaining how you exceeded all expectations.

Example: A water and wastewater utility was seeking the assistance of an engineering firm to improve their engineering department. Staff had developed a white-paper describing the issues they felt needed to be resolved. Sensitive issues were presented quite openly. All contenders were given copies. One firm spent a great deal of time studying the white-paper in order to understand the issues that needed to be resolved, and how best to demonstrate their understanding to the client. Their presentation focused heavily on demonstrating this understanding—they grokked the client. The firm won and received numerous compliments from the client, including "You have demonstrated that you understand our situation as well as we do."

(1) ETC Vol. 56, No 2, 1999 page 127 Grokdueling by Edward McNeal

(2) *ibid.* page 129

(3) Research by The Marketing Consortium and several others.

From Presentation Pointers Vol 12, No 3



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POINTERS FOR IMPROVED PROPOSALS AND PRESENTATIONS

Three Evaluation Criteria Provide Direction for Effective Presentations and Proposals

From Presentation Pointers Vol. 9, No. 1

Are you presenting what your clients really want to hear?

"They are not speaking to my interests." That's what many clients say about the interview presentations they must sit through, and the proposals they must read. Their solution has been simple: Shorten the length of presentations and proposals.

Here in Minnesota, the State Designer Selection Board used to allow 40 minutes per interview. They shortened them to 20 minutes. I asked why. They replied, "We used to get twice as much of the same [irrelevant] stuff." Indeed. I've observed these interviews and most are boring repetition of "the same stuff." For example, firms detail their life history, awards received, jobs done, people hired, and talk of their qualifications. Statements such as, "we meet schedules," "we meet budgets," dominate the presentations. (And this is said to a client base, 86% of whom, according to ACEC research, firmly believe that architects and engineers do not know how to meet schedules and budgets.) And clients find it all repetitive, boring and not very helpful. They tell me so.

"But we do what the clients ask for," is a typical answer I get. But remember, that doesn't mean the client knows what to ask for, or how to ask for that which will help them in their se-

lection process. You, the design professionals, are responsible for the communication.

To help you, here are some recommendations.

First, let's define a presentation (or proposal.)

"A presentation (or proposal) is a device for securing a predetermined audience response by means of a time-constrained (or page-constrained) spoken (or written) message."

Translation:

- a) You want the audience to do something for you. Typically you want their recommendation to hire you. But if your presentations (or proposals) are not helping them recommend you, how can you reach your objective?
- b) Time (and audience patience) is highly limited. You must use this limited time effectively. Please don't focus on your self. Pack your presentations and proposals with vital information that helps them select you.

Here then are the three evaluation criteria by which you can measure the quality of your presentations and proposals.

Have you...

1. Addressed their needs?
2. Accommodated their diverse interests and motivations?
3. Presented persuasive arguments for WHY they should hire you?

1. Address their needs: Your audience knows you are qualified. You would not be on the short list if you were not. Therefore, please don't start your presentation with talking about yourself, your firm and your experiences. What they need to know is that you understand what is important to them and that you know how to meet their needs.

2. Accommodate their diverse interests and motivations: Your audience is made up of people who have different interests, perspectives, biases, concerns and needs. A politician has interests and motivations that differ from that of a department head, or technical professionals, or operations manager. It is important that you reflect these diverse interests and motivations.

3. Present persuasive arguments: The use of persuasive arguments lead to hit rates that are at least twice as high as the classical "tell and sell" approach (Forum Corporation research). To be persuasive means to be agreeable to the audience. To achieve agreement, your best bet is to show how that, which is important to each member of the audience, is achieved with your approach, your team and your people.

As you are working on your presentation (or proposal) ask yourself:

- In what way am I showing that I understand the client's needs?
- In what way am I showing how I am going to meet those needs?
- In what way does my presentation and/or proposal present persuasive arguments for WHY they are best served when they hire us?

Help your clients select you
and your win rates can only go up.

Key Review Questions Lead to Stronger Presentations and Proposals

From Presentation Pointers Vol. 9, No. 2

When you use the following review questions, you will be able to contribute significantly to the success of your presentations and proposals.

1. Does your Presentation and Proposal give the selection committee the arguments they need to justify their selection of you,

and help them justify their recommendation to the final authority?

2. Does your Presentation and Proposal effectively preempt your competition?
3. Does your Presentation and Proposal provide a surprise value factor?

Let's revisit these questions:

1. Provide the needed arguments so the selection committee can justify their selection of you.

You have four topic areas that you can use and adjust in order to provide value to your client:

- a. *the approach*
- b. *the team*
- c. *the individuals*
- d. *the quoted fee*

(Note that your past experience is not mentioned because people buy benefits. Experience is not a benefit when you have a field of "equally" qualified candidates.)

a. The Approach: Is it clear to the client that the proposed approach preempts all potential barriers to project success? Obviously, this question cannot be answered unless you have identified those barriers. Does your approach satisfy all the institutional needs? Does your approach address the personal needs and concerns of each of the decision makers?

b. The Team: Is it clear to the client that the team of organizations represents a rational, practical, highly desirable combination of talents? Has this been demonstrated without appearing as chest pounding.

c. The Individuals: Is it clear to the client that the key individuals are committed, skilled, and right for this job? In other words, can the client easily understand that your team represents the "dream-team" for this project?

d. The Quoted Fee: If your client has requested a bid and if you have decided to bid, (an approach I do not advocate, by the way!) then you can greatly advance your cause by answering the following questions:

Is it clear that the fee represents the level of effort that will minimize their risks and/or make sure project savings are realized and/or protect or enhance their image?

If your bid is higher than your competitor's bid, have you demonstrated that yours is the-

right bid? The spread on professional services bids is typically 400%! Without sufficient justification of why your bid is higher or highest, there is no reason for the selection committee to choose you over a lower bidder. Have you clearly established that your price represents the best value to your client?

2. Preempt your competition.

- a. Covering perceived strengths: As you compare yourself to your competition, have you covered their perceived strengths? "Ghosting" their strengths (i.e. showing disadvantages of their strengths) is an acceptable technique when done with finesse. Don't knock the competition.
- b. Covering perceived weaknesses: Have you taken the perceived weaknesses of your competitor and made them your strengths?

3. Provide a surprise value factor.

Have you offered something over-and-above the basic proposal (and related fee) that will "pull the rug" out from under your competition? This is where you think BIG, think BOLD. Where appropriate, can you offer a guarantee in the form of money, schedule, people or whatever may appeal to their personal needs?

It is not very effective to give a presentation or deliver a proposal that merely explains in technical terms what you are going to deliver, how and who is involved. Ask yourself: How are the selection committee members going to justify their selection of you when they are asked, "Why did you choose them?" What arguments have you provided them that will make their answer unshakable?

Diligently ask yourself these key questions repeatedly in the course of your presentation and proposal development. They will help you increase your win-rate.