

Marketing Associates of Spokane

# Powerful & Persuasive Proposals & Presentations: How to Win More Work

Carla Thompson, FSMPS, CPSM  
Chief Marketing Officer  
NAC|Architecture

# Agenda

- Go/No Go decision making
- Proposals
- Shortlist interviews
- Debriefing
- YOU make the selection!
- Top 10 Tips





Winning proposals are based on  
**good intelligence**  
about the client and the project,  
careful **planning** and  
**structuring** of the material,  
and your ability to **convey** your  
firm's remarkable difference.

# Go/No Go Considerations

- Relationships
- Client needs / issues
- Project background
- Project requirements
- Qualifications
- Competition
- Selection process
- Future opportunities





# Sound Business Decisions

- Client traits
- Contract terms and conditions
- Pricing policy / financing ability
- Cost to pursue
- Profitability

# Proposal Budget

Position	Base Rate	# Hours	Total
Principal-in-Charge (\$125k/yr)	\$60	10	\$ 600
Project Manager (\$75k/yr)	\$36	20	\$ 720
Project Designer	\$60	10	\$ 600
Technical Staff	\$24	0	0
CADD Operators	\$36	0	0
Marketing Staff (\$50k/yr)	\$24	40	\$ 960
Graphics (\$62k/yr)	\$30	20	\$ 600
QA/QC Review Team	\$60	8	\$ 480
Other (contingency)			\$ 500
Direct Costs	\$2,500		\$2,500
<b>TOTAL</b>		<b>188</b>	<b>\$6,960</b>

Estimated fee \$100,000

Estimated proposal budget \$ 6,960

Budget as % of fee 7%

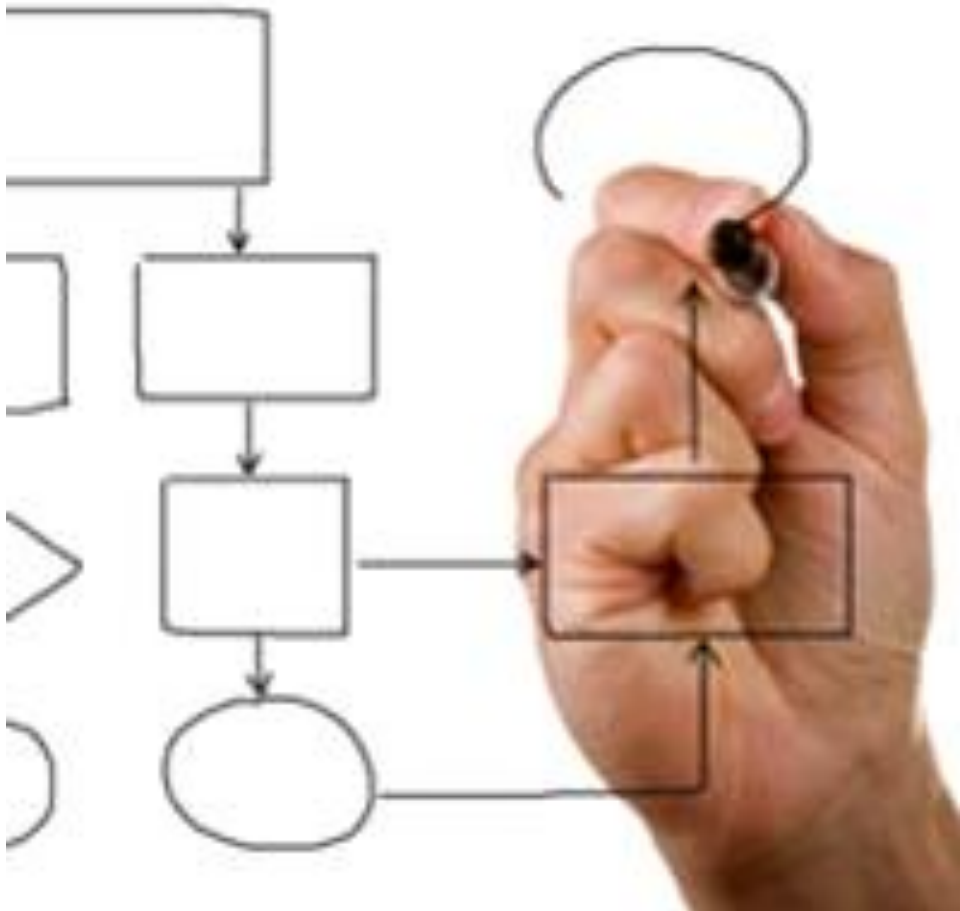


# Proposal Budget Guidelines

- Existing client + existing service .05% - 4%
- New client + existing service or sector 4% - 8%
- Existing client + new service or sector 4% - 8%
- New client + new service or sector 8% - 20%

# Proposal Strategy Kick-off Meeting

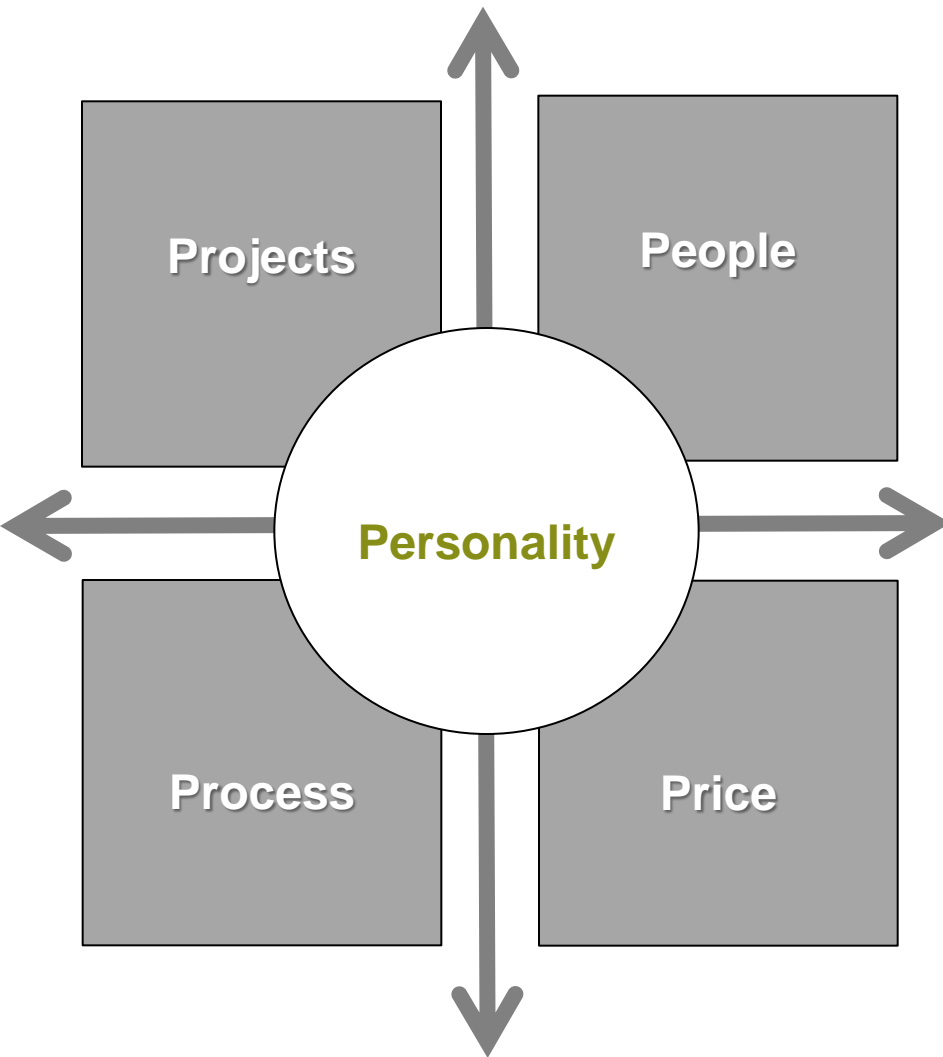
- List project facts and needs
- Brainstorm real wants/desires
- Create YOUR proposal SWOT
- Review RFP criteria
- Outline the proposal
- Identify project team/projects
- Develop a theme/USPs
- Make assignments



# Themes and Discriminators



- Project approach or work plan
- Specific client concerns
- Prior knowledge/lessons learned
- Schedule
- Design, technology or process innovations
- Service and responsiveness
- Financing and/or budget



# The Four P's of Marketing

- Product
- Promotion
- Place
- Price



# Cover Letters

- We are pleased to submit our proposal for blahblahblah...
- Thank you for the opportunity to submit blahblahblah...
- We want to work with your organization on blahblahblah...
- As you know, our firm has extensive experience doing blahblahblah...
- We are the best firm for this project because blahblabblah ...
- Per our conversation...



# Cover Letters

- Short, concise, and to the point
- No typos!
- Summarize key selling points
- Only one “we” statement
- Opening statement reflects understanding or relationship



# Engage the Reader

- [Your project] presents some exciting opportunities to involve the community ...
- The approach we are proposing is different than what you might expect because ...
- Finding tenants is the key to getting this project financed ...
- Having worked with you on over 10 schools over the past ten years we know you expect ...
- What if we could help you generate \$800k in additional sales?

# SO WHAT?



## FAB Statements

**F**eature: Since our founding 20 years ago, ABC Contractors has built more than 600 big box retail stores.

**A**dvantage: We have streamlined our process so we can go from ground-breaking to store opening in 110 days, compared to the average 130 days.

**B**enefit: That means you can start selling product 3 weeks ahead of schedule and earn up to \$800k in additional sales.



# Characteristics of a Winning Proposal

- Consistent, branded format
- Organized and in one voice
- Contemporary format, fonts
- Bold, informative headings
- Simple visuals with captions
- Client quotes
- Relevance

# Proposal QA/QC



- Technical review
  - Project requirements
  - Scope of Work
  - Fees/Pricing/Schedule
  - Terms & Conditions
- Editorial Review
  - Specific client concerns
  - Key selling points
  - Spelling, grammar, punctuation
  - Format and organization
  - References



# Delivery + Follow Up

- Confirm deadline and format
- Research delivery options
- Deliver in person if possible
- Send it a day early!
- Call to follow up

# Proposal Debrief



- Number of proposals, ranking and score
- Evaluation criteria
- Proposal appearance and organization
- Project/client understanding
- Project team and consultants
- Comparison of fees/scope
- Client references



# Presentations



# Strategy Meeting

- Part 1
  - Debrief download
  - Client instructions / criteria
  - Selection committee
  - Shortlist, order, timing
- Part 2
  - Research
  - Outline
  - Presenters, roles, sequence
  - Schedule / assignments



# Check out the Room

- Room layout and seating
- Lighting, outlets
- Equipment
- Acoustics, ambient noise
- Parking
- Availability
- Gatekeeper



# Visual Tools

- Flip charts
- Presentation boards
- PowerPoint or equivalent
- Video
- Presentation aids:
  - Agenda
  - “Playbill”
  - Custom leave-behind
  - Name tags / table tents
  - Pointers
  - Timer
  - Drawings and trace paper
  - Models, etc.

# Do You Need Them?

- Serves as a roadmap
- Prompts speakers
- Creates visual excitement
- Encourages interaction

# Standard Approach

- Introduction
- Key team members
- Project organization
- Project management
- Relevant projects
- Why select us?

# Opening Lines



Blah.

- We are pleased to be here today for blahblahblah...
- Thank you for the opportunity to present our blahblahblah...
- We want to work with your school district because blahblahblah...
- As you know, our firm has extensive experience doing blahblahblah...
- We are the best firm for this project because blahblabblah ...
- How 'bout that game last weekend?



# Opening Statement

- Remember the feeling you got as a kid the first time you experienced...
- I drive by your site everyday and I've imagined what it would look like with...
- My mother is elderly, so designing your Whispering Pines assisted living facility is very personal to me.
- When I sat down to contemplate the design for Redmond City Hall, I was struck by the idea that this should be the city's living room—warm and inviting...

# Client-centric Approach

- Story
- Problem
- Approach
- Benefits
- Evidence
- Summary
- Action





# Make It Memorable

- Link everything to their project, their goals, their concerns
- Use anecdotal stories
- Quantify information
- People remember in 3s
- Demonstrate how well the team works together

“*I am the most spontaneous speaker in the world; because every word, every gesture, and every retort have been meticulously rehearsed.*”

*George Bernard Shaw*



# Common Excuses

- “Marketing doesn’t have my graphics ready”
- “They don’t expect a Broadway production, they know us.”
- “I’m better when I wing it.”
- “The client told us to be casual.”
- “I want to be fresh.”
- “I have *real* clients to take care of.”
- “We’ll practice in the car on the way to the interview.”



# Perfect Practice Makes Perfect Presentations

- Reduces stage fright
- Works as an editing process
- Focuses presentation—identifies the gaps
- Enables easy use of visuals
- Makes transitions seamless
- Keeps you on track & on time
- Allows for interruptions or foibles to occur without disaster



# NO Excuse: Make 'em Rehearse

- Walk through / practice / rehearse
- No script—key bullet points only
- Time the presentation
- Take careful notes
- Provide constructive feedback
- Always do a mock Q & A
- Videotape the rehearsal



# The Art of Q&A

- The PM manages the Q&A
- Listen to the entire question and clarify
- Be brief, use the rule of numbers
- Generate a discussion
- Watch for reactions
- Defer questions when in doubt
- Don't contradict or layer on
- Close with a question

# Debrief: Win or Lose



- Final ranking / score
- Attributes of winning team
- Project approach / solution
- Project team and consultants
- Visuals
- Q&A
- What do we need to do?

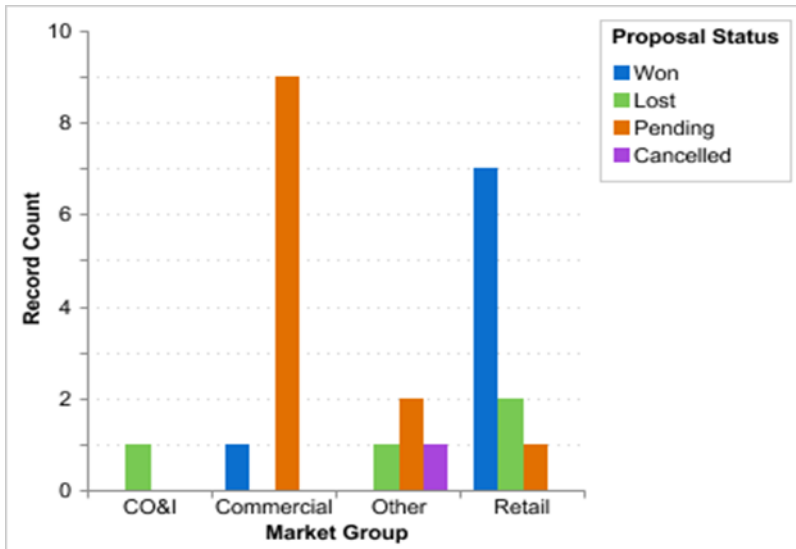
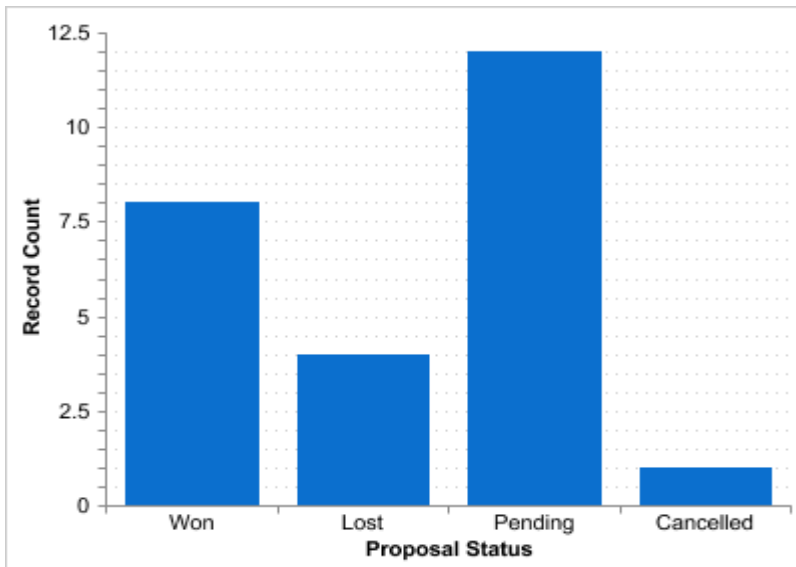
YEARS  
LESSONS LEARNED			

# Presentation Observations:

- Teams were well prepared and rehearsed
- Relevant expertise and quality outcomes were paramount
- Strong team relationships noticed
- Fit and personality
- Demonstrated collaboration skills
- Be prepared for anything!

# Hit Rate Report: Numbers Don't Lie

- Total proposals/presentations by market or office or client
  - Number of submittals
  - Number of shortlists
  - Number of wins
  - Number of losses
  - Number of pending
  - Number cancelled
  - Percentages/costs to pursue





Lessons  
Learned

# RFQ Observations: Positives

- Relevant Experience
- Innovative Solutions
- Concepts that reflect community values
- Smart, but not cute, writing
- Strong references



# RFQ Observations: Negatives

- Too verbose
- Points did not correspond with city goals
- Ideas/experience inconsistent with our needs

# TOP 10 TIPS:

## Proposal & Presentation Best Practices

1. Make smarter Go / No Go decisions.
2. Prepare a budget and track costs.
3. Write the cover letter first.
4. Write 'smart' not 'cute.'
5. Align experience with client needs.

# TOP 10 TIPS:

## Proposal & Presentation Best Practices

6. It's not about YOU, it's about them.
7. No excuse, make 'em rehearse!
8. Invite junior staff to participate.
9. Debrief—every time win or lose.
10. If it's a loss, don't give up, follow up.

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*Thank you!*

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