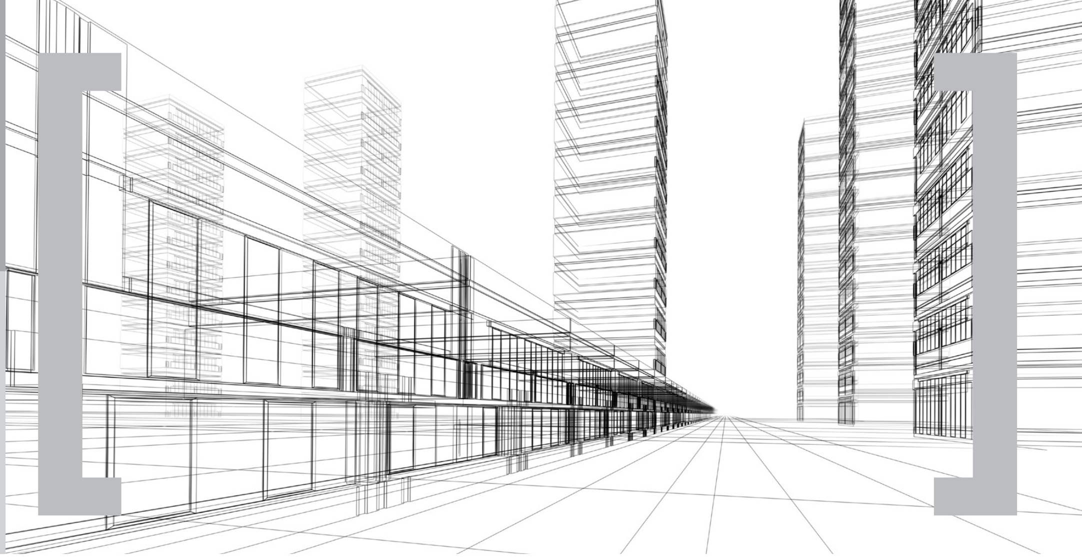

What Your Clients Want You To Know About Your Next Shortlist Presentation

By Rich Friedman, Friedman & Partners

Shortlist presentations could be called "stress list presentations" for the amount of angst they cause A/E/C and environmental consulting firms.

The timeframes are short and the preparation is long. What's worse is that many A/E/C firms that do the hard work required (opportunity research and selection; prepositioning; and thoughtful, client-centered proposal writing) to routinely get shortlisted *still* struggle to win the big show.

How can you improve your win rate? In this article, we're going to the source: your clients. In the numerous loss debrief interviews I've conducted on behalf of my clients over the years, I've heard many recurring themes.

If you're in the fortunate position of having plenty of sole source work or master service agreements, this intel can also help you make a stronger case for your ideas, internally and with clients.

What Clients See

- Firms that have rushed their preparation—and it shows
- A tunnel-vision focus on RFP and shortlist presentation specifics without addressing other perspectives or hot-button issues
- Principals who spend more time discussing themselves and the firm than the client's needs and how they'll measure success
- Teams that spend too much time walking through designs or case studies that don't resonate
- Unfocused presentations that fail to effectively deliver key messages (and include too many slides)
- Uncomfortable project managers (PMs) who read from notes while avoiding eye contact
- Teams that lack energy, passion, or synergy

What They Think

"One thing that stood out about Firm X was how focused they were on our university, understanding the campus, and considering the outside influences on the project. Coming down, studying our campus and other data, and composing a few thoughts on approaches showed a level of commitment. It was clear that research had been done."

"There might have been some of lack of hunger/passion. They weren't super high energy."

"For the Project X interview, nobody liked the principal, Z. He started off by talking about how he joined the firm and why. It was a bit negative in tone and self-serving. The odd thing is that he had been with Firm Y a long time. We were curious why he'd include that."

"[The losing team] did not connect with the audience. It didn't feel conversational. It didn't seem like they were trying to engage our committee. [The winning team] came across as coming from the heart versus reading from a script. They conveyed a strong desire to collaborate with us."

"Many of the committee members almost felt like the project would be put into the meat grinder at one end and spit out at the other end. It didn't feel like they'd be collaborative. It wasn't clear how they were going to manage the planning aspects, and it was similarly sketchy on the research side."

"There were three people [presenting]. Woman #1 was excellent. Woman #2 was very good. The gentleman wasn't very impressive. I felt like he interrupted them. I didn't feel comfortable with their synergy. He wasn't dynamic. The other firms enveloped you in this process."

When you get to know your client in advance, you can change the game.

James B. Hunt Jr. Library, North Carolina State University, Raleigh, NC. Snohetta Architects. ©Jerry Blow Architectural Photography, jerryblowphotos.com.

What To Do About It

Know your prospects. A focused business development effort means tracking and pursuing clients instead of projects—not belatedly chasing "free food" opportunities and making reactive, late-to-the-game efforts to land a project. When you get to know your client in advance, you can change the game. That's what happened to one principal who received a university RFP with criteria so specific that hardly any A/E/C firm (including his) could meet it. He called his campus contact and told him why the RFP would be challenging to meet. The client ultimately changed that RFP requirement and the principal gained insight about the client's goals that he used to formulate a winning project team.

Research the committee. Don't be the team who proposes to rehabilitate and preserve an old building to a selection committee that wants to level it. (This team knew they were toast just minutes into their presentation.) As soon as you can, find out who is on the committee. Often, there are influencers and issues to address; the committee may be weighted towards facilities people, or may include trustees, for example. If you haven't met them, talk to people who know them. Use Google and LinkedIn to learn who they are and what's important to them. Look at their previous roles, skills endorsements, publications, associations, and interests.

Prepare what you can. The more you can do upfront, the better. If your team has not worked together before, it can be difficult to quickly build esprit de corps, define your message, and plan your content. Before the shortlist is announced, think about who will present and what your message is. You can refine later to meet interview requirements. Have your strategy and goals figured out. Also vet your potential teaming partners early on. Doing your due diligence can help you avoid being stuck with local partners or subcontractors that are not dynamic, lack chemistry, or—in the case of one firm—have a negative reputation with the client.

Select the right people. Most clients require that the PM be involved in the presentation, and this is cause for pause. PMs are notorious for being hit or miss in front of clients. Some of them are great, some are coachable, and others are better left at home. Before you put them in front of the client, ask yourself: Can they do this presentation, and do it well? If not, select another PM or enroll them in coaching.

Ditch your formula. Every client, project, and selection team is different. Simply repeating what worked last time or playing it safe can be a recipe for disappointment. For example, when studying their wins and losses, one firm realized that when they felt confident in an opportunity, they had a conservative approach. Yet when they stretched to compete with the big boys, they were bold and took risks—and won some of those projects as a result.

Deliver the experience. Sometimes firms get so interested in their design or engineering solutions that they don't convey what it would be like to work with them. Play up the responsiveness, the collaboration, the communication, or the expertise in the market—whatever your real differentiators are. Most important, have a conversation with your client. Share your passion and ask for the work. Hunger does not equal desperation. It stimulates enthusiasm, and that is contagious.

For your clients, it's simple: Whom do they want to spend the next year (or two or three) with? Read this, absorb it, and brainstorm what your firm can do better to show them you're the best choice. ■