

# Win new business

The desktop guide

Susan Croft

*'Packed with useful information and should be essential reading for anyone in business development.'*

Gloria Vergari, CEO, Norstar Biomagnetics Ltd, UK

*'If you need help to increase your sales, start with this book.'*

Mike Pheneger, University of South Florida, USA

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# Win New Business

## – A Desktop Guide

**Susan Croft**

THOROGOOD

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*This book is dedicated with love to my husband, Alan Stephenson*

*And to my late father, Fordham Russell Croft, who was the consummate salesman.*

## About the author

**Susan Croft** is an international public speaker and corporate trainer. She is founder and partner of ASC Training & Consulting where she is responsible for communications and sales training, as well as public relations consulting for a number of international organizations. She specializes in media training for executives, educators and other professionals.

Previously, she was a senior consultant with the international PR firm, Hill & Knowlton, where she worked for 14 years. Prior to this she ran her own Los Angeles-based PR agency that was acquired in 1986 by a leading international agency. Susan is still a member of Hill and Knowlton's training faculty and runs frequent workshops for all levels of staff.

Susan has worked with a variety of clients in education, non-profit, technology, business to business, and economic development. Organizations she has represented include EDS, 3Com, the Government of Singapore, London Business School, Cambridge University, The Mentor Foundation and the Federation for International Volley Ball.

As an international trainer, Susan teaches at a number of leading Universities in the USA, including San Jose State, Georgetown, USF (Tampa). She is also a trainer for the PR Academy, an initiative of the Government of Singapore's Ministry for Information, Technology and the Arts.

Susan has led public and in-house seminars for many of the UK's leading training organizations. She is also a certified trainer with Lloyd's of London. She teaches media training at a number of UK universities, and delivers a variety of training programs for leading PR agencies. Susan is a member of the Advisory Board of the London School of Public Relations.

Susan has also played a full and active role in public life and has focused specifically on women's issues in the workplace. She is former chairman of the London Fair Play Consortium, a joint venture between the UK Government's department for Employment and the Equal Opportunity Commission. She is also a founder of the London Chamber of Commerce's Women in Business Group and a past chairman of the CAM Foundation.

She is an Accredited Member of the Public Relations Society of America, and a Fellow of the Royal Society of Arts. Susan is an honors graduate and active alumna of University College London and holds a diploma in Journalism from the UK's National Council for the Training of Journalists.

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## **Introduction and acknowledgements**

Very few business managers these days would call themselves 'sales people', yet a large part of their roles involve selling their skills, services and products to new and existing customers and clients and working towards the growth of market share.

In my view there are few aspects of business more challenging, varied and rewarding than developing and winning new business. Yet many otherwise competent and seasoned professionals shy away from it believing that it is best to leave this area of business to the 'sales professionals'.

I believe that two of the most important skills in business are an understanding of marketing and the ability to sell. It is that ability to sell - essentially to communicate effectively to others, be they customers, employees, co-workers or indeed, spouses and friends - that is the base skills of personal success. It is communication skills such as writing, speaking and negotiating that are critical to a successful business life, and it is an area on which I work diligently, attending courses, buying books and tapes, as well as simply observing others who are masters at the skill.

My book will provide you with a step-by-step guide to winning new business and if you follow the advice you should soon be winning more than your fair share of new business.

The book is based on my new business seminar which has been attended by thousands of people on three continents during the 10 years I have been running it. As a business owner and public relations consultant I have been involved in hundreds of new business pitches over the years and I draw upon these experiences to enrich this book and provide practical tips and techniques which will help you win more business, more speedily and most importantly, from the customers you want to work with.

This book will be helpful to those people working in sales positions as well as those in marketing and business development. It is designed for any organization selling products and services in a complex sales environment - that is, in situations where there is more than one buyer and often several people who have some influence on the final purchase decision. It is equally applicable to those working in the public, non-profit and private sectors. The word 'customer' is used generically in this book and encompasses any form of buyer from clients, to consumers. The book is also designed with the small/medium size business owner in mind - people for whom new business is the lifeblood of the company.

This is a comprehensive and practical guide to winning new business and the book is structured systematically from lead generation through to closing the business. However, the reader does not need to approach the book in chronological chapter order. You can dip in at any point you wish and focus on those areas which are most relevant to your needs. I do recommend that if business development is a new role for you, you read chronologically from chapters one to twelve and make sure you complete the exercises too!

The principles and techniques covered in this book, whilst focusing on winning new business, are also relevant to winning business from existing customers and from internal customers.

This book is organized into four parts:

- **PART ONE** covers everything you need to do to lay the groundwork for business development.
- **PART TWO** covers the all-important process of working diligently through the sales process, including lead qualification, understanding customer needs, and overcoming objections
- **PART THREE** moves us forward to the final close and includes chapters on proposal writing, presentation skills and getting the customer to yes, and
- **PART FOUR** concludes with some advice from six experts in business development, and a unique and very helpful chapter from an actual customer's viewpoint. Finally, we conclude with my ten top tips for winning business.

Each chapter includes:

- Brief outline of the content
- Discussion questions
- Thoughts for your ideas bank
- Exercises
- Checklists
- Chapter summary
- References and source materials.

For the sake of brevity, I have used the masculine pronoun generically in this book to indicate both male and female. I hope my women readers will not be offended by this use of English.

I am indebted to the following people without whose help this book could not have been written:

- **To Allyson Stewart-Allen**, director with International Marketing Partners for her contribution to this book. Allyson's insights and experience in the area of generating leads is second to none. She is a true professional and this book could not have been written without her help and advice.
- **To Jeff Woodhams**, trainer and consultant for contributing to the chapter on proposal writing and providing some very useful insights.
- **To Bryan Lee**, Principal Consultant with Cornwell Management Consultants plc, for a most valuable chapter looking at business development from the customer's viewpoint.

And finally to the six seasoned professionals who contributed to Chapter 11, and who have so kindly agreed to share their tips for winning new business.

I should also like to thank Dr. Paul Boulian of Lodestar Associates in Connecticut and John Dalton of David Game College in London, for reviewing my manuscript and providing some very useful comments. Grateful thanks also to Angela Spall of Thorogood, for her painstaking editing of this book.

I have also drawn liberally on the works of other authors to demonstrate my points, particularly from Miller/Heiman<sup>1</sup> who developed the concept of Strategic Selling and have run successful seminars on this area all over the world.

I am also grateful to Hawksmere for running my seminars over the years and for having enough faith in my abilities to recommend to Thorogood that they publish this book!

Finally, I would like to thank you, the reader, for purchasing a copy and I hope you enjoy the reading journey. Good luck in all your new business endeavors!

*Susan Croft*

## Icons

Throughout the Desktop Guide series of books you will see references and symbols in the margins. These are designed for ease of use and quick reference directing you to key features of the text. The symbols used are:



Definition



References



Example



Checklist



Practical pointers



Activity point



Ideas bank



Question and answer

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# part one

Laying the groundwork

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# chapter one



## **Know yourself and your competition**

Introduction

Defining your business

SWOT analysis

Know your competition

How to run a brainstorm session

Summary

## Introduction

*'If a little knowledge is dangerous, where is the man who has so much as to be out of danger?'*

THOMAS HUXLEY

In this chapter we will cover the following:

- Defining your business, your products and services.
- Defining your management style and company culture.
- Identifying your vision and values.
- Identifying your unique selling points or unique value propositions.
- Identifying your current competition and how you differ from them.
- Identifying potential competition and what you can do now to prepare.
- Key tools to help you with the above - SWOT analysis and brainstorming with colleagues.

In chapters four and five of this book we will cover the importance of thoroughly understanding your customer, his company and the benefits you can provide his organization. However, it is just as important to conduct a thorough analysis of your own business and of your competition. This will help you develop an identity and a market position, and an understanding of your unique selling points (USPs) and the best ways to predispose your prospects to buy from you.

## Defining your business



To start this process, you need to answer the following questions:

- 1 What business is your company really in?
- 2 Where do you see your organization in one, five, ten and twenty years?
- 3 Who is your competition now?
- 4 Who are you likely to be competing against in one or two years' time?

Such important questions are best addressed with colleagues in a brainstorming session where everyone is encouraged to speak openly and allowed to let their creative imaginations flow freely. Be prepared to encounter disagreement and widely differing views. This is part of the discovery and identity process and should lead to a clear definition of your company's business, and a vision and values statement.

According to Richard Whitely, in his book *The Customer Driven Company*<sup>2</sup> a vision has two vital functions; one is to serve as a source of inspiration, the other is to guide decision-making, aligning all the organization's parts so that they work together for a desirable goal.

The ideal vision statement is:

- Clear.
- Involving.
- Memorable.
- Aligned with company values.
- Linked to customer's needs.
- Seen as a stretch - that is, difficult but not impossible.

Vision and values need to be communicated systematically, and others in the organization need to create their own compatible visions for their part of the business. The company's leader needs to embody the vision in day-to-day behavior.

In short, a value is what is important to you, what you believe in and what your company stands behind. Vision is an energy-producing statement about a desired future state to which you and your organization aspire.

S

As a brief example of a values statement, Ray Kroc, founder of McDonald's created the following statement to describe those beliefs behind which his company stood: 'Quality, Service, Cleanliness, Value.'

Whitely suggests these steps to keep you on track:

- Create a customer-keeping vision (and we should add customer-winning).
- Saturate your company with the voice of the customer.
- Liberate your customer champions - your employees.
- Smash the barriers to customer-winning performance.
- Measure, measure, measure. Benchmark yourself against your competitors and companies you admire.
- Walk the talk and in particular, walk in your customer's shoes.
- Make customer needs the standard for success.

A

---

### Exercise

*Develop a vision statement for your company. Make a list of the values you believe your company embraces. How can you effectively communicate your vision and these values internally and externally?*

---

As part of this process of understanding your business, it is important to identify your unique value propositions (UVPs). Some people call these unique selling points or USPs, but I think there is a fine distinction here, as smart organizations are moving away from selling just the physical product and are recognizing the importance of tangibles and their value to the customer, i.e. ideas, creativity, knowledge, after-sales service. These added-values are central to selling.

Author Harry Beckwith<sup>3</sup> calls this 'Selling the Invisible'. You cannot touch, hear or see your company's most important products - the value the customer enjoys when he buys from you. So make sure you carefully define those UVPs in order to carve yourself a special niche in your market.



## Define your products and services

The next step on the journey to self-discovery is to define your products and/or services. Such an exercise enables you to truly understand your product in order to create new markets or further develop existing ones. A vital part of this is to identify the real benefits your products offer your customers. For example, Revlon is in the cosmetics business, but what benefits do its products offer those who use them? Asked another way, what does Revlon really sell? A member of the Revlon family once famously answered that question by saying that Revlon sold hope!

In his fine book *How to Drive Your Competition Crazy*, Guy Kawasaki poses the following questions:<sup>4</sup>

- 1 What benefit does your product or service really provide?
- 2 What are the most important reasons your best customers buy from you?
- 3 How is your product positioned in the marketplace - high end, low end, price leader, etc?
- 4 If a prospect doesn't buy your product or service, what does he or she buy?
- 5 Are your customers using your products in ways you never intended? Is there an opportunity there?

Another way to address this is from your customer's viewpoint: What are the factors he uses to determine need, e.g. price, value, relationship, etc? How do your products and your competitors' stack up in the eyes of the customer?



---

### Exercise

*Identify all the features of your product and against each one develop a benefit.*

*This is another exercise you could address in your team brainstorming session.*

---



### Define your management style and company culture

Much has been written on the subject of management style and company culture and both have been described in many different ways from autocratic to consensus, from cash cows to followers.

Guy Kawasaki divides management style into four categories:

- 1 **Contented Cows** are those who have made it and are living off their momentum and past achievements. Decision-making is usually from the top down. They tend to be defensive companies, seeking to preserve position, cash and image.
- 2 **Leaders** are companies who have excelled in their business because of the excellence of their product, marketing or customer service. There are usually two or three leaders in an industry. Middle management tend to make the decisions. They use both defensive tactics to protect their lead and offensive tactics to lengthen it.
- 3 **Upstarts** are firms battling to join the leaders. They are active, opportunistic and aggressive and have little to lose. Decision-making is usually concentrated in a founder or a small group of employees.
- 4 **Guerrillas** are companies which are small and non-mainstream. They survive by hit and run tactics and appeal very strongly to a small niche of the market. Decision-making is by the lower levels of staff. These companies succeed due to their perseverance.



---

#### Discussion question

*Do you recognize your management style in one of the above?*

---

## SWOT analysis

During this process of analyzing your business and products, it is also helpful to conduct a SWOT analysis identifying your strengths, weaknesses, opportunities and threats.

STRENGTHS	WEAKNESSES
Innovative product line	Ineffective distribution channels
Positive reputation	Slow to market
Focus on customer service	Lack of capital or other resources
Long history	Unclear management vision or goals
Market leadership	Unmotivated staff
Global reach	Unaware of external forces affecting the industry or company
Strong management	Lack of internal communications structure
Ability to hire and retain talented employees	
OPPORTUNITIES	THREATS
	Aggressive competition
High demand for product	Low market awareness
Large market share	Relevant government regulations and standards
Unique positioning	Negative media coverage
Positive analyst interest in stock, high rating	Concern about the future of the industry
Competition's products unreliable or poorly perceived	Lack of public support for company

Figure 1: Sample factors that may emerge in a SWOT Analysis

**Questions to ask****Internal Assessment (Strengths and Weaknesses)**

The first step in a SWOT analysis is to assess your company's internal environment to discover what is particularly strong and where improvements need to be made. Depending on the responses to these and other questions, you can determine if each of the areas constitutes an internal strength or a weakness.

**External Assessment (Opportunities and Threats)**

Following the internal assessment, the next step is to evaluate the external - or competitive - environment. This step will determine places where you have a strong foothold in the competitive frame, and areas in which you are vulnerable.

**A****Exercise**

*Conduct a SWOT analysis of your organization and another SWOT on your products or services.*

**Know your competition**

In our SWOT analysis we addressed the company's external environment which included competitive factors. To position yourself with your prospects and counteract competitive forces, you should also conduct a SWOT analysis of your competitors. It is just as important to identify their strengths and weaknesses as it is to identify your own.

This requires intensive and ongoing research not just of the obvious competition, but also the likely newcomers to your market. And remember, customers can often become competitors. So keep your eyes and ears open. Guy Kawasaki provides the following eight tips for researching the competition:<sup>4</sup>

- 1 Pretend you are a customer: visit the competitor's shops; order a catalogue; ask for a price list; request a brochure.
- 2 Become a customer of your competition. You should buy your competition's product and become its customer.

- 3 Become an investor in your competition. One of the easiest ways to get information about a publicly traded company is to buy a share of its stock.
- 4 Query your competition's customers. But do not violate good ethics in obtaining confidential information, even if it's offered to you.
- 5 Read voraciously. Read the trade press about your industry and your competition.
- 6 Attend conferences, seminars exhibitions and association meetings. Listen to the speeches given by your competitors and visit their booths.
- 7 Ask the government. Your competition must make disclosures to local and central government for public offerings including: government tenders, building permits, patent and trademark registration. These are usually a matter of public record and may contain information about a company's goals, strategies, and technology.
- 8 Become a good research librarian. Libraries and the Internet are excellent sources of useful information on competitors and industries.

## A

### Exercise

- 1 *Identify a likely new competitor in your market. What strategy might you employ to counteract the moves this company might make?*
- 2 *Conduct a SWOT analysis of two key competitors in your industry.*



*In addition to a SWOT analysis, you might also consider applying another excellent tool in your competitive survey - Porters Five Forces. Developed by author and Harvard Business School professor, Michael E. Porter, this is a planning system which helps identify the forces governing competition in an industry sector. Awareness of these factors can help an organization stake out a position in an industry that is less vulnerable to attack.<sup>5</sup>*

## How to run a brainstorm session\*



- Select a good facilitator: someone to manage and, when necessary, direct the meeting and ensure that it remains focused.
- Prepare a short (1-2 pages) written brief that includes the objectives/purpose of the brainstorm. Ideally, distribute this in advance.
- Invite a range of people from different parts of your organization.
- The maximum number of people to attend a brainstorm should be 10-12. A good number is 6-8 people (plus a facilitator).
- Consider the brainstorm environment - vary this when necessary. It doesn't have to be in a meeting room.
- Identify the issues - i.e. break down your topic to decide on the areas where you need most help and brainstorm these.
- No ideas are bad - or good. Suspend critical judgement during a brainstorm, or you will start to 'filter' ideas too soon and miss out on some of the best thinking:
  - i) don't criticize other people's ideas because this will stunt the creative process and
  - ii) if you praise an idea, be aware that the group will come up with lots of similar ideas to this and narrow their thinking too early. So, after a short while, you will need to encourage them to explore new routes so that the thinking remains varied.
- Write everything down on the flip chart, as closely as possible in the way the person said it. Otherwise it may appear that you are interpreting or critiquing their ideas too early.
- Go for volume of ideas - generate as many as you can and evaluate them later.
- Think widely, then narrowly: allow people to think widely around the subject for a while, since this will enable them to become more open to new possibilities. Then make sure they return to more focused thinking when you need them to.
- Set a time limit and write a timetable for the meeting - people function better when they know what is expected of them.

---

\* Courtesy of Hill & Knowlton, a leading international public relations agency who run brainstorms regularly with their staff and clients.

- Leave your job title at the door! Titles are irrelevant within a brainstorming session – everyone must have an equal voice.
- Apply the 48-hour rule: revisit the ideas and solutions developed in your brainstorm a day or two later with the benefit of hindsight and reflection. Decide if these really are the ideas you want to adopt and the solutions you want to propose.

### Summary



You have now defined your business, products and services. You have a good understanding of your competition and your own unique value propositions. You have developed a vision and values statement for your organization and have conducted a SWOT analysis. In short, you know yourself very well and are now ready to move on to the next step in winning business – generating leads.

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# chapter two



## **Generating leads:**

**How to create the customers you want**

**By Allyson Stewart-Allen, Director,  
International Marketing Partners**

Introduction

Measuring your time investment

Sources of leads

Gathering and organizing your research information

Prioritizing your leads

Types of decision-makers

Culling your leads

Conclusion

Checklist

Further resources

## Introduction

*'No praying, it spoils the business'*

THOMAS OTWAY

- Measuring your time investment. Helping you track which efforts really pay off.
- Sources of leads. Thinking about the widest range of sources, both direct and indirect.
- Methods of growing the number of leads. Tactics you can use to draw in and reach out to prospective customers/clients.
- Leads and your marketing plans. Aligning relevant and cost-effective tactics to your segmented leads.
- Gathering and organizing your research information. Getting the full picture of a prospect organization before taking things further.
- Prioritizing your leads. Putting effort into cultivating those who deserve you.
- Types of decision-makers. Recognizing the variety of decision-makers you'll encounter in order to give them the types of messages that resonate.
- Culling your leads. Keeping your leads pipeline healthy by reviewing which should stay active, and which should not.

Now that you're clearer about what it is that makes *your* business unique - and how easily replicable this is for your competitors - the next task is to confidently find some more leads to keep your business healthy and your development funnel flowing.

## Measuring your time investment

You might first want to decide how you'll measure your time investment in building your pool of leads in order to know which of your activities are most effective, and which ones are not. You might consider measures such as the total amount of time spent as a proportion of the total fees sold, the increased level of awareness of your range of services or products as a result of your business development efforts, the number of client or customer referrals as a result of your efforts, or perhaps the length of time that lead stays in the sales pipeline or stays put at a given sales stage.

## Sources of leads

There are two key sources of new business leads for most entrepreneurs and companies; direct and indirect. Direct sources will include current customers; franchisees/distributors/alliance partners; assemblers/manufacturers; wholesalers; your company website; internal departments (e.g. call center, sales force); sister companies/divisions and customer information databases.

Indirect sources include the business press; trade associations or clubs and third party referrals from outside your organization.

Whether cultivating your internal or external sources, you might enlist their help by asking them to watch some leading indicators that often mark a true lead:

- A new key person in your prospect's organization, such as an HR Manager, Marketing Director, Corporate Affairs Director, Finance Director (FD), Managing Director (MD).
- An annual spend on your category of product/service at, or above, certain threshold levels.

### Methods of growing the number of leads

There are many ways you might try to build the number of leads from your direct and indirect sources: using either 'push' tactics, 'pull' tactics or a combination of the two. 'Push' methods include seminars, researched letters, advertising, telephone calls, e-mail campaigns, relevant client success stories or case histories that communicate your 'value story'. They're called 'push' because they're driven by you to push

your unique selling messages out to your business leads. 'Pull' methods - which help draw prospects to your door - include viral marketing campaigns, price promotions, product or service promotions (e.g. 'trial' your service/sample your product), contests, public relations activities (writing, speaking, holding TV interviews, stunts).

### **Leads and your marketing plans**

One way to help you assign marketing tactics - like those described above - to your leads is to first conduct a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) for a specific product or service of your company for a given decision-maker you're trying to win over. By analyzing the SWOT, you're aligning the marketing messages that build on your strengths and opportunities, while scripting your responses to the weaknesses and threats of your company's product or service for that decision-maker. Once you've done a SWOT analysis for all the key decision-makers at that lead organization, you're able to talk confidently about their WIIFM (What's In It For Me) of buying your product or service. It's a good idea to get a colleague of yours to review your SWOT analysis in the event there are even more strengths and opportunities for your target decision-maker/buyer you may not have thought of!

Once you've done this, you might then want to assign your lead organization or decision-maker to a sales stage based on these SWOT analyses - such as 'likely to buy' or 'very likely to buy' or 'contact again in three months'. This lets you now assign the mix of marketing tactics to that stage that bumps that prospect to the next highest level of probability of conversion. By doing so, you are planning your marketing repertoire for each stage - which allows you to set budgets, gauge what works to move your prospect along the buying funnel, and analyze your tactics in terms of their effectiveness to build and sustain the dialogue with your prospect over time so you know which tactics deliver results!

Once you've listed your tactics, you can assign other similar prospects with similar SWOT profiles to these sales stages and corresponding tactics. Make sure that when you implement your tactics, however, your timetable and mix fits with your company's other marketing initiatives. It might also be a good idea to involve your direct sources of leads in your tactics - communicate your promotional plan to them, and ask them to play a role.

## Gathering and organizing your research information



One activity that's key to good lead generating and business development practice is prospect research, as doing so usually delivers very profitable results. You can never do *too much* research, while little or no research can be disastrous.

One example of how it can go wrong is a recent client of ours (*before* we advised them!) who I'll refer to as Lads & Co., a leading UK law firm that identified a list of US-based prospective clients. They went along confidently to visit them with their standard Lads & Co. corporate presentation and an offer of a reduced fee rate for their first 10 hours of billable work. When they returned, they not only had two very embarrassing meetings, but no conversions. Their problem? They didn't check their own customer database for the history of any past exchanges between the firm's partners from other practice areas and these prospects.

It's important to capture some basic data about the company and the decision-makers, maybe using a contact management system (such as the popular software packages ACT!™ or GoldMine™) to track all your own and your colleagues' past exchanges with your *qualified* leads. These tools let you easily assign the leads to a sales stage, and assign probabilities of conversion and their likely total revenue at each stage. Other tips for your centralized leads warehouse:

- consider calculating each lead's '*likely lifetime value*' - that is, how long that prospect is likely to stay a customer once converted, and how much they are likely to spend during their tenure with your organization, which helps you segment your leads by value and thus your priorities;
- allow your direct sources of leads (your departmental colleagues, your subsidiaries, your strategic alliance partners) to add even more of them directly into your leads database;
- reciprocally encourage others to widely access this information;
- build in some relevant qualification tests so you can rank the quality of your leads in such a warehouse.



The data that you should track, at a minimum, includes:

- the top five **business** objectives of your lead company, and each decision-maker by name;
- the trends in the industries of your leads (such as moves towards e-commerce? deregulation? cost-cutting, outsourcing, consolidation?);
- recent press releases and financial statements (annual reports);
- any other intelligence you can assemble from your sources and contacts in their industry sector.

## Prioritizing your leads



Now that you've done your research, you're in a position to be able to meaningfully qualify the leads you have. Some ways companies prioritize is by:

- quotes for the mix of products or services to be sold;
- the amount of time needed to move the prospect further down the pipeline towards the 'SALE' end of the funnel;
- the probability of a meaningful return on investment (could be an investment of time, research & development, manpower);
- the prospect's lead-time/buying cycles as dictated by their organization;
- the opportunities to cross-sell other products or services across your organization's divisions;
- your lead's organization structure: Simple? Complex? Autonomy of your contact(s)? Ability to authorize your fees? Decision-making processes;
- amount of preparation required (e.g. must submit rough drawings or designs first);
- amount of money or budget available;
- number of other competitors (beauty parades?).

## Types of decision-makers

The key to prioritizing is keep it simple. Often companies get too scientific about qualifying, and create too many leads categories when a few will do. You might consider three major classes of lead:

- 1 **Likely Few** (near the 'SALE MADE' end of the pipeline);
- 2 **In The Pipeline** (have been tagged as a lead and are being nurtured through the pipeline);
- 3 **Above The Pipeline** (not quite in the pipeline yet, but identified as candidates).

To be able to get a more meaningful measure of the health of your leads pipeline, you should further define your **In The Pipeline** stage, with sub-categories that might include:

- initial contact by letter
- first meeting
- project analysis
- proposal submitted
- contract negotiation
- contract signed.

To make it easier to assess and control the dynamics of several decision-makers within one lead organization, it helps to know who they are, and their respective points of view (or WIIFM's - What's In It For Me).

Types of decision-makers you're likely to encounter or want to cultivate have been described in-depth in the leading book on the subject, *Strategic Selling*, by Miller/Heimann<sup>1</sup> which will be discussed later in Chapter 5:

- economic buyer
- user buyer
- technical buyer
- coach
- anti-supporter (my own addition).

The **economic buyer** usually gives final approval to your sale, can access money or budgets directly, usually releases money for your products or services, and has veto power. Their focus is on the bottom line and the impact of your interventions on his/her company. The key question asked which can help you identify him or her is: 'What return on investment will this get me?'

The **user buyer** judges the impact of your product or service on his/her job performance. There can be many user buyers in your selling situations, as these are the people who supervise or use your products or services. The decision for them to buy or not to buy, from your organization is a personal one, since this buyer must live with your solutions on a daily basis – there is a direct link between the user's success, and the success of your product/service. Their focus is on the job at hand to be done, usually asking: 'How will your product/service work for me?'

The **technical buyer** is often one of the most difficult decision-maker types, as their role is usually to screen you and your company out. There can be many technical buyers in your selling situations that usually judge the quantifiable, measurable aspects of your proposal. Sometimes called 'gatekeepers', they're often asked to recommend the best solution, focusing on the product/service per se. To help you recognize them, expect their key question 'does it meet the spec?'

The **coach** is your guide/mentor for the sale, and you should develop *at least one* (ideally two). Often they are found in a consulting firm, within your lead's organization, in your own company, or outside both. He or she gives you and interprets information about the situation, the decision drivers, the WIIFM's, and focuses on your *success* with *this* relationship or proposal. Their key question is: 'How can we make this work?'

Finally, there's the **anti-supporter**, who often looks like the technical buyer in many ways, but whose motive is to undermine your company's efforts and success. There *can* be many in your selling situations, and their actions are based on emotions or ties to your competitor(s). Though they often hide in mysterious places, they're easy to find by their subjective feelings towards you or your company. Often you can find them by their key question: 'Is this a good move for the company?'

## Culling your leads

One of the least frequently but essential activities in generating and managing leads is the process of 'culling': dropping those from your list that are dormant or unlikely to ever convert to an actual 'sale'. How often you should do this depends on the ratio with which you're comfortable of active versus dormant leads - the more dormant leads that are on your list, the more distracting they become. The criteria you should apply for the culls might well be the same as those you applied for your prioritization or assignment to a sales stage. If you're in a commercial enterprise you can expect returns on investment to feature prominently. Some criteria you might want to consider include:

- the length of time that a lead has been 'on the books' as a prospect;
- the speed or movement through the pipeline stages (has it been stuck in one stage for a very long time?);
- its probable lifetime value to your organization;
- the probability of conversion -if it's below a certain threshold level, perhaps it should be dropped;
- the degree of fit (based on your SWOT exercise) with your company's range of products and/or services;
- the lead's source;
- the number of other companies invited to pitch in addition to yours (beauty parade).

## Conclusion

Generating new leads is often one of the most exciting, exhilarating parts of a professional's job. What can make it even more rewarding is approaching the process in a methodical, profitable way that lets you measure the impact and track results. Many companies don't apply a planned, measured, ruthlessly time-assigned approach - encouraging them to draw conclusions based on nearly random causes-and-effects.

With planning and careful assigning of your time to those leads that have a clear need for your products and services, whose WIIFM's you've taken the time to assess, and which marketing messages you've carefully aligned to them and their SWOT, you're sure to be one of the most successful business developers in your field.



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**Discussion questions**

- 1 *If you had to profile your company's 'prospects from heaven', what characteristics would they have? How can you communicate this profile to your direct and indirect sources of leads?*
  - 2 *If you were to develop a 'lead qualification questionnaire', what would the questions on this instrument be?*
- 

**Thought for your ideas bank**

- Track your return on time in order to know which lead generating activities pay off, and which do not.
- If the WIIFM hasn't been articulated to your sources of leads, they're unlikely to work hard to help you find them.
- The key to prioritizing your leads is to keep it simple. Don't create too many categories.

**Words of caution**

- If you haven't developed profiles or models of your 'prospects from heaven', you won't recognize them when you meet them, potentially misallocating your time on those prospects which don't deserve you.
- Always first check your own company's customer or leads databases before approaching a prospective company or decision-maker - there might be a history worth knowing!

**A**

**Exercises**

**Task 1**

- Long-list the **effectiveness measures** (performance indicators) that describe effective business development activities.
- List those which your company uses now (‘Current’) and could use (‘Potential’).
- Next, consider companies you admire most (or least) for their business development results, and why.

**Task 2**

- Consider the **WIIFM** of your direct and indirect sources to feed you and your team with qualified leads.
- Take five minutes to write down your ‘elevator pitch’ – telling your source their **WIIFM**.
  - What incentives would win you even greater cooperation?
  - Do these cost money?
- How can you ‘action’ these incentives?

**Checklist**



**Direct sources of leads:**

- Current customers.
- Franchisees/distributors/alliance partners.
- Assemblers/manufacturers.
- Wholesalers.
- Company website.
- Internal departments (e.g. call center, sales force).
- Sister companies/divisions.
- Customer information databases.

### Summary

- Measuring your time investment.
- Sources of leads.
- Methods of growing the number of leads.
- Leads and your marketing plans.
- Gathering and organising your research information.
- Prioritizing your leads.
- Types of decision-makers.
- Culling your leads.
- Conclusion.

### Further resources



- Chartered Institute of Marketing ([www.cim.co.uk](http://www.cim.co.uk))
- American Marketing Association ([www.ama.com](http://www.ama.com))
- International Marketing Partners ([www.intermarketingonline.com](http://www.intermarketingonline.com))

# chapter three



## **Creating personal and company visibility**

Introduction

Public relations and personal visibility

Some tactics to consider

How to write a press release

Raising your profile in the market

Summary

Further reading

## Introduction

## Public relations and personal visibility

*'In the future everyone will be famous for fifteen minutes'*

ANDY WARHOL

Well perhaps you can be famous for more than fifteen minutes with the help of this chapter. It most certainly will help your business, as long as you are famous for the right reasons – that's known as good PR.

In this chapter we will cover the following:

- An understanding of public relations and how to use it.
- How to establish good media relations and raise your profile in the market.
- How to write a press release.
- Tips for conducting press interviews.
- How to give a speech.
- Using seminars to profile yourself in the market.

Creating visibility for yourself, your products and your company can be enormously effective in helping you win new business. In order to predispose customers to buy from you, they need to know who you are and to understand what your products and services can do for them. Remember that McGraw Hill ad which ran some years ago in Business Week that read as follows:

'I don't know who you are  
I don't know your company  
I don't know your company's product  
I don't know what your company stands for  
I don't know your company's customers  
I don't know your company's record  
I don't know your company's reputation  
Now – what do you want to sell me?'

Raising your profile in the market and maintaining a good, positive image will help you create a market environment which is conducive to business development. People are much more likely to want to buy from you if they have heard positive things about your company, its products and services.

Good PR and personal marketing can help you achieve the following:

- Turn cold calls into warm calls.
- Create a positive environment for sales.
- Turn customers into evangelists.
- Get prospects knocking on your door, rather than the other way around.
- Raise your profile in the market place.
- Create share of mind for your corporate or product brand.
- Get your voice heard in the high noise level of the market.

You can learn from the examples of the big brand companies without having to spend their marketing communications budgets!



Let's start with a definition of the frequently misunderstood practice of public relations. PR is about reputation management, unlike advertising it is what others say or think about you, as opposed to what you say about yourself. This is where its power lies. What could be better than having your prospects, customers, employees and other stakeholders saying positive things about you and feeling well disposed to your products and services?

The fact is that nobody will say anything about you unless you communicate, and unless you build a profile in the market and seek to win friends and influence people.

Public relations is also about communication which must be two-way. It is essential that an organization communicates effectively with its key audiences (be they employees, customers, prospects, shareholders, regulatory bodies or government), using the various channels at its disposal. It is equally important that organizations listen to their customers and other audiences and act on what they learn from the market. In this way they can adjust their communication according to market needs and feedback.

## Some tactics to consider

Public relations is also very effective in helping close the gap between perception and reality. How you are perceived by your market may not be a reflection of your true character. Good public relations – reputation management – will help bring perception and reality closer together so that how you are seen by the market is how you want to be recognized. This does not happen overnight though. PR is not the quick-fix solution. For PR to be effective it must be strategic, planned and sustained.

### Making friends with the media

The press can be a great ally and an effective means of creating goodwill for your products and services. However, good relationships are not created overnight, it takes much hard, steady work as well as flexibility and resourcefulness. You should start by taking the following steps:

- Create a list of target journalists and publications. I would suggest you start with about 20 rather than 200, unless you have the resources of a PR agency, or internal PR department, behind you.
- Develop a press kit consisting of background information on your company, products and key players in your organization, as well as photos of your executives. Your press kit can also contain copies of recent news releases (see later section on how to write these).
- Develop your key messages and create an internal ‘question & answer’ document which should include not only the most frequently asked questions about your company and products, but also those questions you would prefer not to answer! Certain members of the media are notorious for asking difficult and negative questions and you should be prepared for all eventualities by preparing various position statements. Make sure your staff and colleagues agree on the answers and statements and that you are all singing from the same hymn sheet. It is also important that people know who is allowed to speak to the media and in which areas, i.e. marketing, financial information, technology, products, etc.

- Contact your target media individually and introduce yourself. You might invite them to visit your factory, laboratory, or offices, so they can familiarize themselves with your operations. Perhaps you could just send them a copy of your press kit.
- Consider opportunities for making positive public announcements about your company. For example, new products and services, fresh contracts, new management hires, expansion, new offices, etc. These can be turned into press releases and sent to your target media.

There are many ways you can use the media to communicate effectively with your customers and prospects. Here are a few ideas:



- Write a case study about your product or service and how it is used in the marketplace. Encourage a customer or client to endorse the article and include some key quotes and a photograph. You can place such pieces with your key trade press who are always seeking information and stories about how products are used and what the benefits are to the organizations using them. Contact your trade press editors and ask for a copy of their *Guidelines for External Contributors* which will be helpful to you as you write.
- Write a letter to the editor of your local newspaper, trade magazine or customer internal newspaper. You could focus on a key issue facing your community, your market, or your customer's business. Perhaps the letter could provide the kernel for a feature article.
- Write a by-lined article for one of your target media. Try not to focus specifically on your company and its products and services, but rather on the wider issues facing your industry.
- Issue a press release when you have something important to say. If you have never written a release, then you should follow the guidelines outlined in this chapter.

**A****Exercise**

*Identify a topic of interest to your market around which you could develop an article or press release.*

In his excellent book, *Relationship Marketing*, Regis McKenna has this to say about establishing good press relations:<sup>6</sup>

**Meet with journalists one-on-one**

A one-on-one meeting takes more time, but makes more of an impression on the journalist and delivers the message more efficiently than a Press conference. Messages can be tailored to the audience: whether trade magazines, business magazines, or the general-interest press. The 90/10 rule applies: 10 percent of the Press influence the other 90 percent. So select and meet the most influential members of the Press.

**Educate the media**

Maintaining Press relations should be seen as an education process. Companies need to help journalists, so they can present a fair description of emerging trends and technologies. Companies should give journalists as much information as possible. It's not enough to hold up a new product at a Press conference and say, 'here it is'.

**Look beyond products**

Companies should explain how their products fit into existing and future business environments. Products should be discussed in terms of how they affect things like 'global competition', or 'white-collar productivity', or 'manufacturing technology'. The Press is fascinated by glimpses of what lies ahead.

**Be honest about bad news**

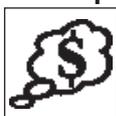
When there is bad news it is best to be as honest as possible. Trying to hide the news will make it worse. The Press has a long memory, even if the public doesn't. When things go wrong, talk first to your employees and then to your customers. If the people closest to the problem or most affected by it are informed and satisfied with your response, the Press pick up on that attitude.

## **How to write a press release**

- Develop an angle for your story. For example, the opening of a new factory in a city means more jobs in the area and a boost to the local economy – this would be a good angle for the local city media and probably also to the national newspapers.
- Write in the inverted pyramid style, i.e. ensure that your most important information is contained in the first paragraph rather than at the end of the release. This is quite opposite to the way most of us learned to write essays and reports at school, in which the most important information and conclusions are left to the end.
- Make sure you include the 5W's and the 1H, that is Who, What, When, Where, Why and How. You need to address the key questions a reader would ask.
- Put your name and contact number at the top of the release and include your angle in the heading.
- Include date and place of the release in the first line.
- Include quotes from the most credible spokespeople – this is the only place you are permitted to editorialize.
- Write in the third person and the active tense.
- Consider including a photograph and if you do, ensure that a caption is affixed to the back.

### Ten tips for conducting press interviews

- 1 Be honest.
- 2 Be timely – tie your story into media agendas.
- 3 Observe deadlines.
- 4 Know the audience the media is serving.
- 5 Be informed.
- 6 Be responsible.
- 7 Be articulate and concise.
- 8 If you don't know – say so!
- 9 Use bridging techniques to keep to your agenda.
- 10 Don't lose your temper if provoked.



### Thought for your ideas bank

If you are using the bridging technique – remember the acronym – ABCD.

This means:

- Address the issue.
- **B**ridge to your agenda by using a link phrase such as, 'that reminds me of' or 'furthermore, let me say...', or 'but let me return to the most important point here....'
- **C**ommunicate your concern or message, in other words get back to the point you want to make.
- Add a **D**angle or a new piece of interesting information.

## Raising your profile in the market

In his book *203 Ways to be Supremely Successful in the New World of Selling*<sup>7</sup>, John Graham has this advice for raising your profile:

- **Position yourself as the expert in your field.** It takes time to be accepted and recognized in a field. Yet, it is your expertise that will get you invited through the door of a company. In the past, it was what you sold that caught the customer's attention but now it's what you *know* that is of value. What you're *selling* becomes significant to the customer only because *you* make sense.
- **Spend time in front of groups.** Seeking opportunities to communicate your knowledge should be at the top of your list of priorities. Participating in panel sessions, delivering detailed speeches and presentations are extremely productive opportunities for you to communicate your competence.
- **Practice personal visibility.** Some people call it 'personal public relations'. The label is irrelevant; the result is invaluable. Far from being just another way of selling yourself, it is making sure your company's PR department knows who you are and what you're doing. The company magazine or newsletter is a valuable outlet to be seen and heard. Getting acquainted with the editors and writers of pertinent trade publications can be useful.
- **The bottom line.** Becoming your own best public relations advocate is not just about publicity, but about positioning yourself as the expert in your field, *the* person to do business with. The job of sales people is no longer just to make sales calls to communicate, but to motivate the customer into wanting to do business with them.

### A

#### Exercise

*Develop a brief ten-point outline for a speech or presentation which you could deliver at an industry seminar or as part of a panel session at a trade exhibition.*

### Holding seminars

Another great technique for raising your market visibility, position yourself as an expert in your field and to make yourself invaluable to your customers and prospects, is to hold a seminar with yourself and your colleagues as featured speakers. Here are some guidelines to follow when organizing such an event:

- 1 Select a subject of interest to your audience. Get to know which areas and issues are of interest to your prospects and focus on these. You may want to invite one or two guest speakers to participate, who are experts in the subject area.
- 2 Choose an accessible business venue – a centrally located hotel or meeting center and review all the arrangements the day prior to the program with the sales or banqueting manager. The quality and service provided by the venue can make or break your event.
- 3 The rule of thumb on attendance is between 3% and 10% of those invited. So in order to attract 20 participants, you need to invite at least 200. If you are not charging a fee for your program, expect at least a 15% no-show.
- 4 If your program mailing is very successful, do not worry about having to schedule a repeat seminar for the overflow group. You can apologize and say that the seminar has proved far more popular than originally anticipated.
- 5 Start your planning at least 3 months in advance and prepare your invitation list first. In addition to prospective and existing customers, you may also wish to invite suppliers, partner companies, opinion leaders in your industry, employees, and the press.
- 6 You should also implement a pre-seminar marketing program to support your mailing. This could include telemarketing, public relations, and maybe some advertising in your trade media.

- 7 Make sure you prepare handouts for all participants. This should include:
  - A copy of the agenda.
  - Copies of speeches and presentations.
  - Information about your company.
  - Biographies on the speakers.
  - A seminar evaluation form.
- 8 Make sure it is easy to register for the seminar - you could provide a toll free or freephone number, a postage-paid business reply coupon, or the ability to sign-up via your web site.
- 9 Keep the seminar relatively short - no longer than half a day and provide refreshments on arrival and during the breaks, and possibly a breakfast, lunch or cocktail reception, depending on the time of day. The breaks provide ideal networking opportunities.
- 10 Develop a post-seminar plan to include:
  - Thank you letters to those who attended, addressing any issues or questions raised in the evaluation forms.
  - Phone calls to the best prospects.
  - Adding names to your database for future action.

You might also consider holding such a seminar jointly with one of your key customers. This is an excellent way to forge deeper relationships and become invaluable to them.

## A

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### Exercise

*Identify a seminar topic, a guest speaker and at least 20 people you would like to invite to your event.*

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### Sponsor something

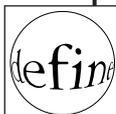
Sponsorship is a great way to support your business development efforts, providing a number of key benefits such as:

- Brand and product promotion.
- Opportunities for client and customer hospitality.
- Raised market profile.
- Positive public relations.
- Networking opportunities, particularly with other sponsors and, for the smaller company, to be seen on a par with the larger sponsors.
- And last, but by no means least, supporting a worthwhile cause, be it the Olympic games, your town park, or your local museum.

### Turning customers into evangelists

If you have not read Malcolm Gladwell's wonderful book - *The Tipping Point*<sup>8</sup> then I strongly advise you to do so. To give you an idea of what the book is about and why you should read it, let me quote from Gladwell's introduction:

*'The Tipping Point* is the biography of an idea and the idea is very simple. It is that the best way to understand the emergence of fashion trends, the ebb and flow of crime waves or, for that matter, the transformation of unknown books into bestsellers, or the rise of teenage smoking, or the phenomena of word of mouth, or any number of the other mysterious changes that mark everyday life is to think of them as epidemics. Ideas and products and messages and behaviors spread just like viruses do.'



In *The Tipping Point*, the author introduces us to three different types of people – people that anyone in business development would be smart to identify and to cultivate. The three types are:

- **Connectors** who have a huge network of people and are adept at spreading messages about new products, for example.
- **Mavens** who are data banks of knowledge in their own areas of interests. They are the people we refer to for advice when buying a new car or a new computer. They make it their job to gather and analyze information, however minute.
- **Salesmen** who are natural persuaders and have great powers of influence over others. Gladwell observes such people in communication with others and notes how easily they establish rapport and synchronicity with whomever they are talking.



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#### **Discussion question**

*Do you know any 'connectors', 'mavens' or salespeople' in your business whom you could cultivate as partners and advisors on the road to winning new business?*

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#### **Raising your profile through smart socializing and effective networking**

This might seem like an unusual topic to introduce into a book on winning new business, but I feel it would be remiss to omit it. Most business people today have to conduct a lot of business outside the traditional office and meeting room environment, and I would like to share with you some tips on how to present yourself at such functions, and at the same time raise your personal profile.

The old adage – 'It's not what you know, but whom you know', certainly rings true for those of us whose job entails attending social business functions and the many cocktail receptions associated with trade fairs, conferences, sales events, and off-site meetings with customers and colleagues.

Working a room is a risk and can be very intimidating. The idea of walking into an enormous ballroom with hundreds of strangers all of whom seem to know one another, can fill even the most stalwart of us with fear and anxiety. Attending a party with strangers is the number one social fear, according to a study on social anxiety reported some years ago in the *New York Times*.

However, such an activity can be tremendously rewarding, on both a personal and a professional level, and is a requirement in most management positions, particularly those in sales, marketing, communications and the professional services.

The benefits of being able to work a room with ease and grace are manifold:

- You can make invaluable business contacts, as well as starting new friendships that may last your whole life.
- It can be an ideal opportunity to cement relationships with customers/clients or correct misconceptions and problems that may have arisen in the relationship. It is often easier to do this over a cocktail than in your customer's boardroom!
- It often provides a wonderful opportunity to gain market knowledge and 'inside' information, as well as identify new market territories and key players.
- You make others feel more comfortable, which makes them want to do business with you - an invaluable commodity in those businesses where 'chemistry' counts.
- You can become a powerful ambassador for your own organization, often opening doors to promotion and career growth.

### The eight typical cocktail party characters

- 1 The homing pigeon:** The person who sticks with his/her own colleagues through the entire event.
- 2 The rabbit in the headlights:** Very nervous – limp and sweaty handshake – would clearly prefer to be elsewhere – probably in bed with a cup of cocoa!
- 3 The cocktail party bore:** Dominates the conversation with boring details about life, family, work and thoughts on every subject under the sun (usually in a loud voice). Tends to corner his prey.
- 4 The married to the buffet table (MBT):** Seeks refuge in food. Doesn't say much as it's difficult to eat and speak at the same time.
- 5 The suspect alcoholic:** Similar to the MBT, but prefers alcoholic drink. Becomes slowly inebriated throughout the event and tends to fix people with a glassy stare and a stupid grin.
- 6 The lounge lizard:** Usually male and tends to frequent such events regularly, primarily for the objective of meeting attractive women.
- 7 The limpet:** Locates a friendly face and sticks with that person the whole evening. Very difficult to shake.
- 8 The butterfly:** Flits from one group to another without contributing too much. Tends to be unfocused and always looking for the next opportunity. It's hard to engage the butterfly in any meaningful conversation.

Do you recognize yourself in any of the above? Or perhaps you recognize people you have met at social functions.

What the best business socializers have in common:

- They treat everyone as interesting, special, likeable and witty.
- They make others feel safe and part of the occasion.
- They introduce people to each other; remember names; and something about those they introduce. In other words, they shift from 'guest' to 'host' behavior (note: when making introductions introduce the most senior person first.)
- They have charisma; they smile; they draw others out.
- They are at ease with themselves; their charm is contagious.

- They are not vain or self-centered. They build self-esteem in others.
- They look at things from different angles.
- They have broad horizons.
- They are enthusiastic.
- They are curious and ask lots of questions. But their questions are non-invasive.
- They empathize with others.
- They have a sense of humor and are able to laugh at themselves.
- They have their own special style.
- They recognize different communication styles and use 'mirroring' techniques.



**Discussion question**

*Do you possess any of the above qualities? Where do your strengths and weaknesses lie vis-à-vis these characteristics?*



**Most frequently asked questions and issues about how to work a room**

**Q: How can I overcome my fear of making a fool of myself or appearing like an outsider?**

A: Prepare for the event: Guest list; venue; logistics; knowledge bank; your self-introduction; be clear on the reasons why you are attending and whom you wish to meet.

**Q: I worry that everyone will be looking at me as I enter the room and that makes me very self-conscious.**

A: People will only look at you if you are dressed in a highly unusual way; if you are announced; or if you are very famous! However, you should still enter the room with confidence, using positive body language.

**Q: What's the best way to introduce myself to a group of strangers?**

A: Approach groups of three or more people first, stand on the periphery of the group within earshot and within eye contact of at least one member. When there is a pause in the conversation, introduce yourself, perhaps by adding to the conversation.

**Q: I'm always forgetting people's names. Are there any techniques to help with this?**

A: You are not alone! Most people have difficulty remembering names and it gets worse as we get older! Here are two techniques which will help short-term recall: When you are introduced to someone try to repeat their name out loud as soon as you can in the conversation. Alternatively, repeat the name quietly in your head and try to associate it with something or somebody. Word association can be a powerful tool.

**Q: I'm always getting stuck with just one person at a social function and find it very difficult to extricate myself – any tips?**

A: Yes, remember your graceful exit. Thank the person and say how nice it was to meet, wish them a pleasant time and move gracefully away. You might introduce the person to a third party or say that the host has asked you to circulate. The exchange of business cards is often a cue to move on. Never just walk away from the person leaving them high and dry in mid-sentence!



**Other useful pointers for successful socializing**

- Watch personal grooming; practice a firm handshake and two or three second eye contact when introduced.
- Move from guest to host behavior.
- Remember the graceful entrances and exits.
- Use bridging techniques in conversation - it will help you drive the agenda and convey your key messages.
- Keep one hand free to accept business cards and shake hands.

- Take a break from the social circuit once in a while to enjoy the buffet and have a drink. It is very difficult to shake hands, exchange cards, hold a plate and a glass at the same time.
- Remember to follow up as needed. Send a thank you letter to the host if appropriate.

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*Source:* How to Work a Room – a 3-hour workshop, including a reception, conducted by Susan Croft.

## Summary

In this chapter we covered the importance of public relations in terms of raising market profile and we examined some of the key ways you can increase awareness and reputation. We also looked at developing business relationships outside the traditional office environment in terms of smart socializing with clients, customers and others.

(I do recommend you read Susan Roanes' book, 'How to work a Room' which is full of useful information on networking.)

Now we are ready to start the lead qualification process.

## Further reading



- *First Five Minutes:* How to make a great first impression in any business situation • **Mary Mitchell**
- *You've Only Got Three Seconds:* How to make the right impression in your business and social life • **Camille Lavington**
- *Dig Your Well Before You're Thirsty:* The only networking book you'll ever need • **Harvey Mackay**
- *How to Work a Room* • **Susan Roane**
- *How to Gain the Professional Edge:* Achieve the personal and professional image you want • **Susan Morem**
- *Do What You Are:* Discover the perfect career choice through personality type • **Paul Tieger & Barbara Barron-Tieger**



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## **part two**

**Working the sales cycle**

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# chapter four



## Lead qualification

Introduction

Qualifying leads

Developing a sales strategy

Summary

## Introduction

*'If a man will begin with certainties, he shall end in doubts; but if he will be content to begin with doubts, he shall end in certainties'*

FRANCIS BACON

In this chapter we will cover the main questions and issues you will need to address in the lead qualification process, in order to help you develop an appropriate sales strategy. We will also consider those situations when it is best to walk away from the opportunity, however painful it may be. You will also be introduced to the 'sales funnel' concept which will be covered more fully in Chapter 5.

If you have been working hard at lead generation and raising your visibility in the market, you should have plenty of leads to pursue. Three of the most important aspects of lead management are:

- 1 Qualifying leads to ensure you pursue the ones which are most likely to become wins.
- 2 Developing the right sales strategy to bring each lead to a final sale.
- 3 Having the courage to walk away from potential business if you do not feel it is right for you.

Let us look at each aspect:

## Qualifying leads

### Balancing risk against opportunity

This is essentially a process of balancing risk against opportunity and is an important part of business management. In most cases, new business development is a below-the-line activity - you cannot charge your prospects for trying to win their business! It is therefore important that leads are carefully qualified as business development can be a costly and resource-driven activity that often takes you and colleagues away from revenue-producing work.

In my own business, I use a scale of 1-5 to rate my new business leads. Those rating a 1 on the scale are the ones to walk away from or to refer to another potential supplier. Those rating a 4 or 5 are the ones



I focus my efforts on, the ones I feel I have a good chance of winning, based on the factors I applied in the lead qualification process. Of course, there is always a risk that you will not win the business, but it should be a measured risk.

Let's look at some of the factors that will help you measure that risk. Most of them will apply to just about any new business situation:

- Prospect's financial viability.
- Potential size of the business and budget available for the specified products and services. Is the budget realistic? Sometimes potential buyers do not want to tell you how much budget is available preferring to hear from you how much you think they should be spending. There may be a good reason for this, but in my experience it is frustrating and time-consuming to bid for business in this way. It's like going into a car showroom and refusing to tell the salesperson what sort of car you are looking for. He ends up showing you everything from a Fiat to a Rolls Royce before you finally reveal your price point! A waste of time for you and the salesperson.
- Can you meet the customer's needs as far as you can identify them at this point?
- Do you have a good product/service fit?
- Do you have the resources available - a) to develop the proposal or tender document and b) to do the work should you win it? If it is a business opportunity you really want to pursue, there are options available to you if the answers are 'no' to both of these questions. You could outsource, partner with another supplier, hire staff, train existing staff, or simply subcontract some of the work to an independent or consultant who can provide services as part of your organization.
- Is this the sort of business you want? Does it fit with your strategic business plan? Is there an opportunity to leverage further business in the future? Is there an opportunity to develop new skills for your people or new products in partnership with the customer?
- Is this the sort of company you want to work with? Do you share the same attitudes and values? (There is more on this important aspect of selling in Chapter 6.) You might want to develop an ideal customer or client profile and see how closely each of your prospects meets your ideal customer criteria.

- Who are your competitors? It is very helpful if you know which other potential suppliers the prospect is talking to. You can develop your sales strategy based on competitor strengths and weaknesses as well as your track record of success when pitching against them. Another aspect of knowing who you are competing against is to know how many competitors are in the bidding. I would be very reluctant to run in a 10-horse race, especially if I had to put a great deal of effort getting to the final hurdle.
- Will this be a showcase account for us? Will it open doors to business with other companies in the same sector? Will we gain market visibility if we win this business?
- Do we know who the decision-makers are and if not, can we identify them and gain access to them?
- Is this the right timing for us? Do we have time to develop a proposal and then to deliver the solutions?
- Is there a conflict of interest? Are we currently working with a customer competitor and is this on an exclusive basis? If there is a conflict, you need to develop a policy for handling it.
- Is this a real opportunity or is the prospect just 'window shopping' and looking for some new ideas without paying for them. Perhaps they are simply going through the bid process as a due diligence requirement without any intention of ousting the incumbent.
- Are there any hidden agendas that could impact on us later in the sales cycle?
- Are there likely to be contractual problems? Have they had a poor record with other suppliers?
- Is this an ethical company? If you are selling professional services (e.g. PR, advertising, accountancy, management consulting) this is a very important question since your reputation is very much aligned with theirs. If they run into legal or governance problems, or get lambasted by the Press, you don't want to go down with the ship. Just look at the Enron/Arthur Andersen debacle in the USA.
- What would be the impact of not pitching for this business? Perhaps you need to be seen in the race, or your absence could be negatively interpreted.

**Thought for your ideas bank**

You might develop an ideal customer profile identifying a wish list of attributes you are seeking in your potential customers – people and companies you want to work with. You could then apply your profile to your existing customers and clients. How many meet your ideal criteria? This can sometimes reveal some interesting factors about the sort of business you already have and whether you are satisfied with it.

**Exercise**

- 1 *Select a new business opportunity and rate each of the above on a scale of 1-5, 1 representing poor and 5 excellent.*
- 2 *Add at least five of your own factors and rate these as well.*

If you are achieving mostly 4s and 5s, then this is a real opportunity for you and one to which you should be devoting time and resources. If you are rating 1s and 2s, then maybe you should consider walking away from the business, or perhaps putting it on the backburner.

However, if you do turn down business, don't burn your bridges. Most of us work in small markets where people change roles and remember sleights. What might not work in January with one company, could look very different in October, because things change. So keep your position open if possible and maybe revisit them in the future.

You may also have to walk away from the business at a later date. This is part of the sales funneling process that will be discussed in the next chapter. However, do try to avoid walking away at the 11th hour after you have devoted significant time, money and resources. Continuing qualification of your leads will help avoid this unfortunate situation.

## Developing a sales strategy



### The pitch team

Now you are ready to develop your sales strategy which should be reviewed and revised as you work your way through the sales cycle and as you discover new information. An important part of the strategy for most of us, is the make-up of the pitch team you put together who will support you in winning the business. The ideal pitch team comprises three key factors:

- 1 People with the right expertise and appropriate experience.
- 2 People at the right level in your organization (you do not want too many chiefs and not enough Indians, or vice versa).
- 3 Those who have the time to devote to winning the business and probably servicing it if you win.

Do read the contribution on 'best teams' by Tony Burgess-Webb in Chapter 11 in which he makes some useful points about the pitch team.

You will need to continually motivate and challenge your team. Good communication is key here. Keep them informed and talking to you and to each other. This is particularly important if you are working with third parties, i.e. consultants or sub-contractors. You might consider setting up a special zone on your Intranet in which information can be shared and progress reported on all those important new business opportunities. At the very least you should meet regularly and involve everyone in team brainstorming and strategy sessions.

### Budget

You might also want to allocate a budget for each lead to cover expenditures likely to be incurred. If you are required to complete daily timesheets in your company, as with many professional service organizations, you might also record hours spent developing new business against specific job numbers.

You may need to adjust your business development strategy as you work your way through the sales process and discover more about your customer and his needs. This will be covered more fully in the next chapter.

**A****Discussion question**

*Consider a recent new business opportunity which was unsuccessful. What sort of pitch team did you have? Identify the factors associated with the team which may have contributed to the failed bid.*

*Now consider the reverse, i.e. a piece of business which you won.*

**When to walk away**

Here are six different situations which you should walk away from, as much as it might hurt to do so:<sup>9</sup>

- 1 When the buyer asks for a kickback or bribe. Earn sales with service, quality and performance, not with questionable ethics.
- 2 When the buyer abuses you, a member of your company, or your product/service. This personality type could spell a lot of trouble later on.
- 3 When your analysis suggests that the time and energy this customer will require cannot justify the probable gain.
- 4 When the buyer asks for too many modifications and you start to feel uncomfortable about the final product.
- 5 When the buyer puts too many demands on the fulfillment team. Stay on good terms with your company's manufacturing and service departments. After all, they must deliver on all your sales, not just this one.
- 6 When you honestly feel that your product or service will not work for this customer. Never be so hungry for business that you pursue a deal that will not produce a satisfied customer. If you can't offer the best solution, be honest. The goodwill you generate may deliver big returns in the future.

## **Summary**

Now that we have looked at the important process of adequately qualifying your leads and devising an appropriate sales strategy for those you want to pursue, we will turn to the equally important process of managing them through the sales cycle.

# chapter five



## **Working the sales cycle and managing your leads**

Introduction

Understanding the sales cycle

Identify your buyers

Build relationships with your buyers

Research

First impressions

Knowledge management

A word on the Sales Funnel

Revenue forecasting

Summary

*'As the ancients say wisely, have a care o' th' main chance, and look before you leap, for as you sow, you are like to reap'*

SAMUEL BUTLER

## Introduction

In this chapter, we will cover the following:

- The three key things to do when working through the sales cycle.
- Different types of buyers and what is important to them.
- Identifying a coach to help you win the business.
- The best ways to build relationships with your buyers.
- Conducting both internal and external research.
- The Sales Funnel model.
- Forecasting sales revenue.

## Understanding the sales cycle

The sales cycle – that period of time between initial contact and closing the business – is getting increasingly longer. Whether you're selling computers, manufacturing equipment, or financial services, customers have more choice and often take longer over their decisions.

During this period, you must develop a plan for remaining in front of your prospects. This may involve participating in a seminar, mailing a reprint of an article, adding their names to the distribution list of your company newsletter, or arranging to meet them at a trade exhibition or industry event. It will certainly involve meeting with them. In essence, the sales cycle is now an ongoing process of communicating your competence and winning the hearts and minds of your prospects.

The length of the sales cycle will differ from business to business. In an advertising agency the average time from lead identification to close of contract is between two weeks and three months; in the construction industry it averages between six and 18 months; and in the aerospace/defense sector it could be several years. The only time in most businesses when the sales cycle will be considerably shortened is when you are dealing with a prospect in a crisis situation. Then the



important point to remember is to **SELL AN IMMEDIATE SOLUTION TO THE PROBLEM**. Simply put: If the farmer's barn roof is on fire you do not sell him insurance or a new roof, you sell him water or a fire extinguisher - the new roof comes later! In a crisis it is necessary to separately identify immediate and long-term solutions.

**A view of the sales cycle**

Let's consider the sales cycle in the form of a curve which grows over a period of time, depending on how long it takes to get a final decision from lead identification to closing the business.

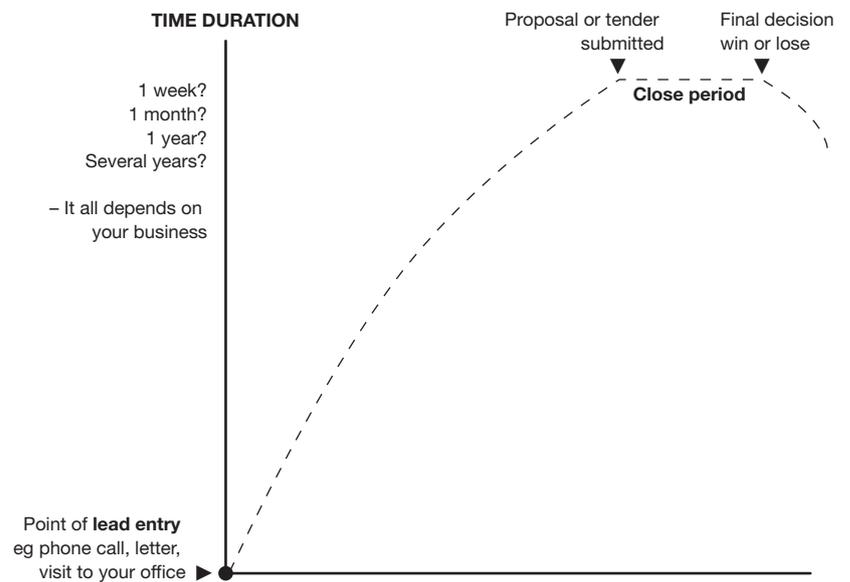


Figure 2: View of the sales cycle

Regardless of the business you are in, there are three activities that must be carried out as you work your way through the sales cycle. They are interwoven and are mutually supportive:



- 1 Identify your buyers.
- 2 Build relationships with them.
- 3 Research their business and understand their needs.



### Thought for your ideas bank

Consider the starting point of your sales cycle: in most cases it is a prospect approaching you via the telephone or visiting your office, remember that first impressions count. A poor first impression may not lose you the business but may count against you in the long run. Have you ever conducted a telephone audit in your company? Maybe you should try telephoning your department as if you were a prospective client to see how your call is dealt with. What would your impressions be if this were a real situation? The result could be an interesting learning experience!

### Identify your buyers



This is probably the most important thing you will need to do as you seek to win new business. You need to get to the decision-makers as quickly as possible so you do not waste your time spinning wheels. Sometimes it is difficult to reach the key buyers. They are often surrounded by 'gatekeepers' whose job is to keep you at bay. Sometimes you will be dealing with someone who assures you he will make the final decision to buy, and you later discover that he wields no real power in the buying process. The most unnerving situation is to find yourself making your final sales presentation to a room full of strangers - people you have never met and who know little about you - and this after maybe several weeks or months of hard work! In my experience, such a situation usually puts you at a great disadvantage. You must remember that, in most cases, decisions to buy, or at the least the predisposition to buy, are made before the final pitch.

In their excellent book, *Strategic Selling*<sup>1</sup>, authors Robert Miller and Stephen Heiman, identify three different types of buyers. These buyers were briefly described by Allyson Stewart-Allen in Chapter 2, but now let us examine them in more detail.

Miller & Heiman introduce us to the following types of buyers each with their own spheres of influence.



### **Economic buyer**

The economic buyer has direct access to budgets in his organization as well as discretionary use over funds. Essentially, this person writes the checks. He also has veto power, which sometimes means that he can change the buying criteria and often screen out any of the potential vendors fairly late in the game. The key focus of the economic buyer is the bottom line impact your product or service will make on his organization. He is corporately focused and will likely be asking - 'what kind of return will we get on this investment?'

There are several factors influencing where the economic buyer sits in terms of organizational hierarchy. These factors are associated with risk - the greater the perceived risk, the higher up the management hierarchy will you find the economic buyer.

Here are some examples:

#### **Factors influencing the economic buyer**

- Amount of sale.
- Business conditions - robust or poor?
- Experience with your firm.
- Experience with the product or service you are selling.
- Potential impact you will likely make on his organization.

It is essential that you make every effort to meet the economic buyer and to understand his needs and the benefits you should be selling him. Economic buyers in my business have included Managing Directors, CEOs and partners in professional service firms.

### **User buyer**

It is likely that you will have most contact with the user buyer as you work through the sales cycle. His role is to make judgements on how you will impact performance in his particular area. The user buyer is often the person using or supervising the use of your product or service, and sees a direct link between your success and his own. His decision to go with you or not, is therefore a little more personal than the economic buyer's - he has a vested interest in your performance. The user buyer will ask the question: 'How will this work for me?'

User buyers in my business have included managers of marketing, PR, brand and product development. As with the economic buyer, it is essential that you win the support of your user buyer.

### **Technical buyer**

Although the technical buyer is not usually a key decision-maker, he does play an important role in the buying and tendering process. He will judge the measurable aspects of your proposal and is something of a gatekeeper in the organization. His role is essentially to screen out potential bidders and to ensure that the selection process is robust and has followed the rules (usually his own).

He will make recommendations to the economic and user buyers and they will most likely listen carefully to his advice. The technical buyer cannot say 'yes', but he can say 'no' and frequently does! His key question is: 'Does it meet the specifications?'

Technical buyers in my business have included purchasing and finance managers as well as those responsible for the bid and tender process in their organizations.

Sometimes the roles of the three buyers overlap, but more often than not, you will find they are separate.

Miller/Heiman also identify a fourth individual who is not a buyer but who can play a key role in helping you win the business. This person is known as a coach and you should seek out a coach in each and every sales opportunity. The coach will be your guide, often uncovering hidden agendas, arranging meetings with the key buyers and helping you interpret the information you are receiving. Your coach can sometimes be found in your own company, occasionally in the buyer's company as well as a third-party organization, for example a sub-contractor or partner firm.

I have worked with many different coaches who have been invaluable in helping me win new business over the years. Such people have included colleagues within my own organization who know the prospect well and have been able to give me useful information to guide me through the business development process. I have also found coaches in partner and third-party companies – individuals who have no direct interest in winning the business, but have been pleased to guide me and my team all the same.

Each of the buyers and the coach are seeking different results in terms of their relationship with you and you should identify these results in every case. The results associated with the three buyers will be corporately focused, but the result that the coach is seeking may have more personal connotations, e.g. more visibility in your organization, or greater recognition in a professional area.

## A

### Exercise

*Consider a new business situation and identify your key buyers. Is there a coach who can help you?*

## Build relationships with your buyers

As mentioned earlier in this chapter, it is important to gain as much 'face time' as possible with your prospects as this can considerably influence the decision to buy from you as opposed to another vendor. In my view, you are putting yourself at an enormous disadvantage if you have one phone call, or a piece of correspondence from them, and then develop your proposal with no further contact. In the final analysis, people buy people, and they buy from the people they want to do business with. It is important that you get to know your buyers and build bonds with them.

One of the most effective ways to build relationships and uncover needs, is to meet with your prospects face-to-face. Such meetings should be carefully planned, particularly the first ones. Here are some points to remember:

- 1 Prepare in advance.** Develop a timed agenda and a list of areas you want to cover with the prospect. You may wish to send him an advance copy for input.
- 2 Take a colleague or team member with you.** There are three reasons I recommend this, if you have the resources and time to do so:
  - it is useful to have someone with whom to compare notes later;
  - you are presenting a team approach and demonstrating your commitment at an early stage;



- you may miss something which your colleague picks up - remember that much of what we convey is communicated through body language, and you may be too busy writing or thinking of your next question and therefore miss a vital signal.

**3 Let the prospect do most of the talking.** There will be a time later when you will have the floor, so to speak. In these early meetings your role should be as a skilled facilitator, drawing out your prospect and uncovering agendas and needs. This should be done through carefully crafted questions and active listening techniques. Remember, the best (and most undervalued) communication skill is listening, and they say the finest salespeople are great listeners.

**4 Take copious notes.** These will form a key part of your research and can be shared with others on your team. I like to leave new business meetings with too much information, rather than too little.

**5 Avoid instant solutions.** You should make sure that your responses to the client are measured and thoughtful, even though you may be itching to provide an immediate solution. Picture this scenario:

Your buyer has been grappling with a major problem in his organization for several months and is discussing this with you. You have been in his office only several minutes and you have the answer. He will probably feel threatened, foolish and at a disadvantage, particularly if his boss is with him. Remember you are trying to win friends and influence people and this is not the way to go about it. You may indeed have the answer, but be careful how you present it. It's not always what you say, but how you say it.

The only exception to this rule is when dealing with customers in crisis, then make sure you present the right solution, as discussed previously in this chapter.

**6 Follow-up on your meeting.** You might want to send a thank you note by email, address issues that had not been covered in the meeting, or send the prospect a brochure.

## A

**Exercise**

*Prepare your next meeting with one of your prospects. List the questions and issues you want to cover. Develop an agenda for the meeting.*

**Research**

In my business, research is a vital activity when developing solutions and proposals for clients. I suspect that this is so in most businesses, although the amount and type of research you conduct will differ. I suggest that in your role as a salesperson or business development manager, you also consider yourself a 'knowledge manager'. The more you know about your customer, his needs and his business, the more useful you will be to him and his organization.

Here is a useful blueprint which has served me well in conducting my new business research and has been instrumental in helping me win business:

**Internal research**

This is conducted within the prospect's company in which there can be found a wealth of information both through the written word and verbally in meetings and interviews.

You should try to meet as many people as possible. People who can provide information about the organization, its goals and its markets. I like to devise a series of questions focusing on the following simple formula:

- **Where is the prospective client now?** This looks at the market in which he operates, the factors affecting that market, the competitors, customers and influencers, among other factors. It is essentially an audit of the customer's business at this point in time.
- **Where does the prospective client want to be?** This includes a thorough understanding of their business goals and the timetable for reaching them. Later in this book, when we look at putting the proposal or tender document together (Chapter 8), I will show you how you can really add value by demonstrating how you can contribute to the achievement of their goals.

- **How will we help them achieve their objectives?** These are questions that focus on strategy, tactics and deliverables, against a critical timetable, with options and priorities. You can test the water with ideas and proposals as you develop your proposition.
- **What results do we want to deliver and how will we measure success?** In my view, this is a critical element in winning new business. Of course, excellent technology, products and services are key, but the ability to demonstrate and deliver results and be accountable for your actions and recommendations is vital, and is something that can set you apart from your competitors. More on this in Chapter 8.

As part of **internal research**, you should try to obtain copies of business and marketing plans. The prospect may be unwilling to part with these, but may allow you to take a copy under a non-disclosure agreement – it is worth asking. There may also be parts of it which are non-confidential and which could be very useful to you. There will be plenty of material you can obtain which is not confidential, for example sales and marketing literature, annual reports, research documents which have been made public, copies of recent news releases, the company's press kit, etc.

Incidentally, the process of conducting this research requires you to meet with the potential buyers, which in turn helps you uncover needs and agendas, which in turn helps you build those important relationships.



### **External research**

The second part of the blueprint is conducting research outside their organization, balancing what they are telling you with what is so in the market. Again, there is a wealth of information in the public domain and a great number of people you can talk to. Here are some resources you can refer to:

- Your local business library.
- Trade associations.
- Chambers of Commerce.
- User groups.
- Current customers/clients\*.
- The trade press.

- Market reports.
- Searches on media coverage about the prospect's company.
- Analysts who follow the customer's market.
- Research papers.
- Your own company's research department.
- Your colleagues who follow the market who will, at the very least, have views on the company.
- Customer's competitor literature.

*\* Make sure you have permission before you approach the buyer's customers.*

### **Desktop research**

Finally, there is a rich storehouse of information available to you without ever having to leave your office. Everyone, nowadays, has access to the Internet and you should use it widely and deeply. Check out the customer's site, as well as those of their customers and competitors.

There are also a number of online information services you can access, including FT Profile, MAID Profound, Hoover's, Lexis-Nexis, Reuter TextLine, Millward Brown Precise, the Economist Intelligence Unit, and many more. Research should be an important part of your business development strategy, and if you do not already subscribe to one of these services, you should consider doing so now. In the 'knowledge economy' information and the interpretation of information is a new powerful tool!

In Chapter 8 I will show you how you can use this research as a competitive factor to help you win the business.

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A

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### **Exercise**

*Prepare a bullet point plan of the research you will carry out on one of your prospective customers. Include people you will talk to and where you will go for information.*

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### Thought for your ideas data bank

Think about employing a student intern or a graduate recruit to help you with research - particularly the desktop. After all, they will probably have spent the last three or four years conducting such activities and will be familiar with web surfing, analyzing data and report writing. You are also doing some good, by providing practical work experience for tomorrow's salespeople and business managers!

## First impressions

The customer's first impressions of your organization are created at the very start of the sales cycle with the first phone call or the first visit to your offices. A poor first impression may not lose you the business there and then, but it can affect the way the prospect is predisposed towards you thereafter.

There is an interesting book entitled *You've Only Got Three Seconds*<sup>10</sup> based on the premise that opinions are formed about you within seconds and that you are evaluated by those around you on the immediate impressions you make. Do take a look at it.

You might want to conduct a phone audit and play the role of the prospective customer calling your organization. What does it feel like? How is the call handled? Can they actually get through to anyone? Are calls promptly returned? Is everyone on endless voicemail - the thorn in the side of the modern business nowadays! I have known many companies, large and small, conduct such an exercise and believe me it is a learning experience!

The same principle applies to the prospect's first visit to your company. How is he greeted on arrival and by whom? If he is kept waiting is he offered coffee or something to read? What impression is given by your reception or lobby area? Are there current newspapers and trade publications available? If you have achieved an award or glowing press coverage, are these prominently displayed? Are there samples of your work on show? All these seemingly small things can make a big difference in how you are perceived by your potential customer in those early days.

## Knowledge management



Much of this chapter has been focused on information gathering and research. This process can be made much simpler if your company has an effective knowledge management system in place that all staff can access with ease.

Consider how you can use your Intranet site to share information on new business opportunities. Perhaps you might create individual zones for each prospective customer that might contain the following information:

- Details on the prospective account, including any 'hot buttons'.
- Names and backgrounds of the individuals on the customer's buying team.
- Names and backgrounds of the individuals on your pitch team.
- Contact reports after each meeting or conversation with the prospect.
- Anticipated problems.
- Sales strategy and timetable.
- Drafts of the proposal or tender document you are preparing.



---

### Discussion question

*How can you use your Intranet to help you track the progress of sales leads and share information with your team? Would you consider creating a new zone entitled perhaps, 'Prospect Workroom'?*

---

## A word on the Sales Funnel

The 'sales funnel' model is a useful tool to help you track lead progress. Again, referring to the book *Strategic Selling*, Miller/Heiman<sup>1</sup> provide the following useful chart:

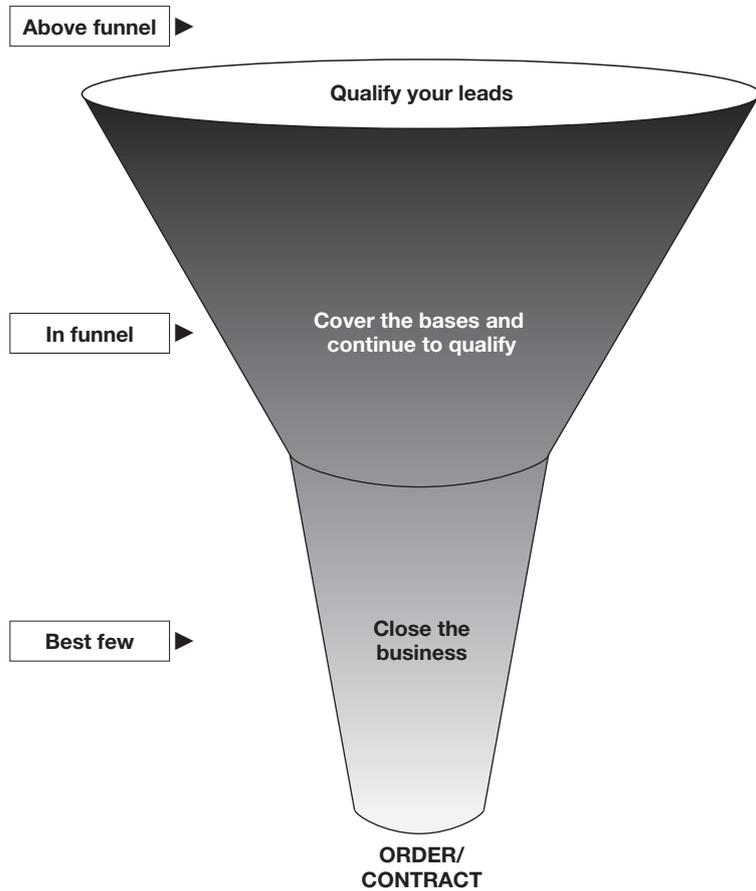


Figure 3: The Sales Funnel



The sales funnel can help you do the following:

- Identify and sort your sales objectives.
- Track progress on each of your leads.
- Set priorities on each lead.
- Allocate time to each lead.
- Help you decide which team members should be working on which leads based on their different skills. (For example, some people are better at lead identification than closing the deal.)
- Forecast future income based on how your leads are moving through the funnel.

## Revenue forecasting

A word on revenue forecasting which is an inexact science, at best. Most of us who have to do quarterly forecasts of potential new business revenue, have a formula for doing so. I present mine here, but would like to emphasize that it is, by no means, fool proof. It is just one way to do the job.

Imagine you have four new business leads in your sales funnel. The first is a brand new one and you are in the early stages of qualifying it. Based on your best estimate you believe the potential budget to be \$50,000. However, because this is such an early stage, you estimate your chances of winning the business at about 10%. Your forecast on this lead therefore becomes 10% of \$50,000 which is \$5,000.

**Your second lead** is a little further down the funnel but still some way from being pushed through to a win. You reckon this one could be worth \$100,000 and you allocate a 25% chance of winning the contract. Applying the same formula the forecast for this lead is \$25,000.

**Your third lead** is a good way down the funnel and you are working on the proposal. You know there are two other bidders but you feel cautiously optimistic and assign yourself a 60% chance of winning the business, which you know at this point is worth \$120,000. Your forecast is therefore \$72,000.

**Finally, your fourth lead.** You are pushing this through to a win and the customer is reviewing your contract. Be careful though, you do not yet have a signature, even though you are now the only horse in the race. This opportunity is worth \$100,000 and you allocate a cautious 90% chance of winning the business – thus \$90,000. If you now add these four figures together: \$5,000 + \$25,000 + \$72,000 + \$90,000, your forecast for this period is \$192,000.

In closing this chapter I offer a final word of advice: Every time you close a piece of business, do make sure that you have other leads progressing through the funnel. The tendency is frequently to focus all our efforts on closing business, which often means other leads are neglected. You do not want to end up with an empty funnel, every time you win a new piece of business.

## **Summary**

In this chapter we examined the nature of the sales cycle and identified the three key activities which need to be undertaken as you work through it. We also looked at how to apply the 'sales funnel' concept to make the business development cycle more effective and, in particular, to forecast new business revenue. Now we turn to a fascinating aspect of new business development - the psychology of selling - essentially winning the hearts and minds of your customers.

# chapter six



## The psychology of selling

Introduction

Personality and behavior

The four personality types

How to influence the activist

How to influence the controller

How to influence the amiable

How to influence the analytical

Retail therapy?

How people process information

Gender and communication

Summary

Further reading

## Introduction

*'Economic choices are a function of how people perceive the world'*

DOUGLASS NORTH, NOBEL PRIZE-WINNING ECONOMIST

This chapter covers the following areas:

- The concept of selling on personality types and communication styles.
- An introduction to the Myers-Briggs Type Indicator (MBTI).
- An analysis of different styles according to a four-quadrant grid, and how to influence them.
- An introduction to Neuro Linguistic Programming (NLP).
- Gender differences in communication - men and women in the workplace.

## Personality and behavior

Our ability to communicate and interact effectively with people can make the difference between success and failure in our work and personal lives. This process begins with an understanding of ourselves and how we are perceived by those around us. Over the years we have all built our self-perception on information received from others. How we perceive the world is a function of what makes us tick as individuals and what sort of people we are. Much has been written on this subject and it is an area which intrigues me. If you have not read the revised edition of Dale Carnegie's *How to Win Friends and Influence People*<sup>11</sup>, then I urge you to do so. This chapter will focus on winning the hearts and minds of our customers, and using influencing and communication skills to win business.

Starting with Carl Jung, psychologists and social scientists have observed and categorized behavior. A major research undertaking into personality and behavior was carried out by two psychologists in the 1940s, Isabel Briggs Myers and Katharine Briggs. They developed a landmark study on personal style and behavior known as the Myers-Briggs Type Indicator and MBTI test instrument which has been refined and improved over the years. This test instrument has been applied by a large number of organizations when recruiting people and creating teams, and by individuals when seeking career changes and a better understanding of themselves.

As Myers-Briggs determined there are sixteen different personality types, and every person fits into one of them. This is not to say that people are not all unique. According to authors, Paul Tieger and Barbara Barron-Tieger<sup>12</sup> in their book - *Do What You Are*:

‘One hundred people of the same personality type in a room would all be different because they have different parents, genes, experiences, interests, and so on. But they would also have a tremendous amount in common. Identifying your personality type helps you discover and learn how to take advantage of that commonality.

...all personality types are equally valuable, with inherent strengths and blind spots. There are no better or worse, smarter or duller, healthier or sicker types. Type does *not* determine intelligence or predict success, nor does it indicate how well adjusted anyone will be. It does, however, help us discover what best motivates and energizes each of us as individuals, and this in turn empowers us to seek these elements in the work we choose to do.’

The research conducted by Myers-Briggs has led to the development of social and management style models that cluster behaviors around four different overarching styles. This model sets forth predictable patterns of behavior and can be used to better understand one’s own behavior and that of others. Such an understanding can help to minimize friction when dealing with others and increase co-operation and understanding.

## The four personality types

Most social and managerial style models use a four quadrant grid to inter-relate two key dimensions of behavior:

- 1 **Power or assertiveness:** the degree to which an individual asserts himself, controls and presents himself and his ideas with confidence, strength and assurance.
- 2 **Emotion or responsiveness:** the degree to which an individual reveals himself, his emotions, feelings and impressions. In other words how 'open' the person is.

The cross-referencing of these two dimensions produces four combinations of behaviors, each with its own label and distinctive behavior and communication style.

High assertion/high emotion = Expressive

High assertion/low emotion = Controlling

Low assertion/high emotion = Amiable

Low assertion/low emotion = Analytical

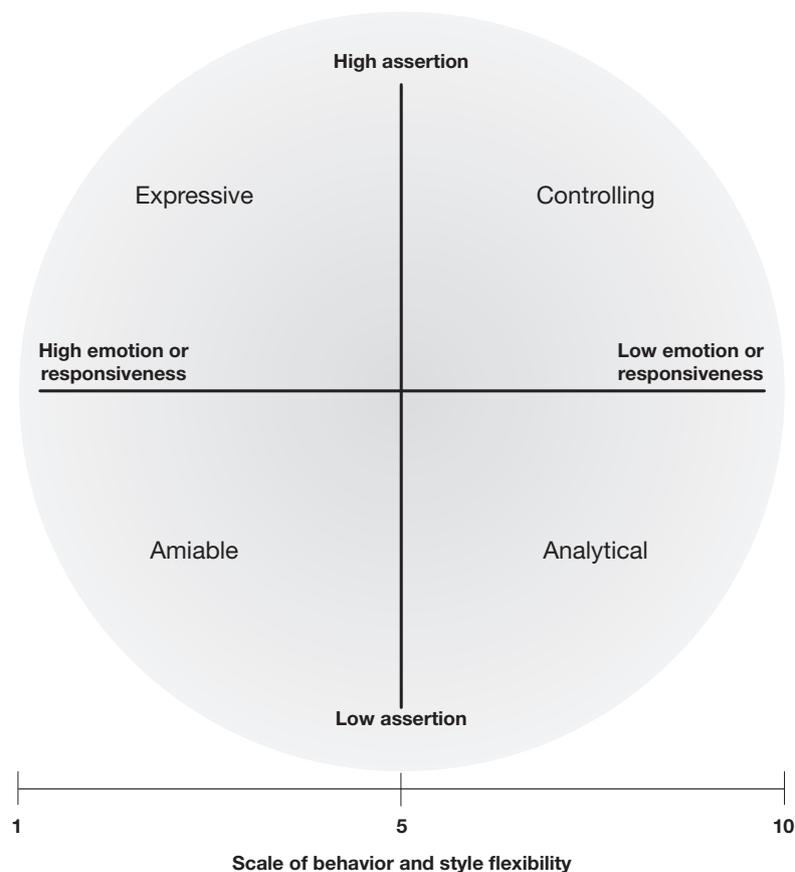


Figure 4: Behavior and communication styles – the key is flexibility



### Characteristics of expressive personalities

Also known as activists, these are the big picture people. They don't like focusing on detail and can become easily bored if there is too much of it. Gaining recognition is important to the expressive personality, they prize their awards and their offices will probably proudly display them. Talking of offices, these individuals like the open-plan layout and if they have their own offices, they will probably maintain an open-door policy. They will have no hesitation interrupting you to discuss ideas (usually their own) and engage in creative problem-solving with whomever will listen. They often have the annoying habit of finishing your sentence for you! The following adjectives describe the activist style:

- Creative.
- Disorganized.
- Enthusiastic.
- Spontaneous.
- Intuitive.
- Personable.
- Stimulating.

When negatively perceived, the following descriptors might apply to this style:

- Excitable.
- Undisciplined.
- Unrealistic.
- Too talkative.
- False.
- Do not follow through.
- Unreasonable.
- Over committed.

## How to influence the activist



These people will respond well to praise and reward. Show them how they will benefit from a certain action and how they might gain recognition in their job, profession or industry.

### Characteristics of controlling personalities

These people are generally natural-born leaders and like to be captain of the ship. They are often entrepreneurs or intrapreneurs if they work for other people and they are only happy if they are leading the team. People with controlling styles, also known as drivers, are very goal-oriented and like to focus on the bottom line. This is not the sort of person you pass the time of day with. If you have a meeting with a driver, get to the point and then leave! They value directness and like working with people who get things done. The following adjectives describe the controller:

- Disciplined.
- Organized.
- Efficient.
- Pragmatic.
- Persistent.
- Competitive.
- Decisive.
- Bottom-line oriented.

When negatively perceived the following descriptors might apply to this style:

- Autocratic.
- Overbearing.
- Pushy.
- Insensitive.
- Ruthless.
- Domineering.
- Egocentric.
- Dictatorial.

## How to influence the controller



Show them how your proposal will help improve the bottom-line. Focus on results and objectives and get to the point quickly.

### Characteristics of amiable personalities

The amiable style, also called consensus seeker, is the team player and is happiest when helping others. This individual likes harmony in the workplace and eschews change. If you are introducing the idea of change to a consensus seeker, first start by telling him what will remain the same and then tell him what will change. Amiables often have family photos in their office and value the personal touch. In meetings they tend to listen more than speak and will only voice their views when they are very sure of their ground. The following adjectives describe this style:

- People-oriented.
- Team player.
- Loyal.
- Supportive.
- Willing.
- Good listener.
- Dependable.
- Empathetic.

When negatively perceived, the following descriptors might apply:

- Conforming.
- Wishy-washy.
- Overly agreeable.
- Gutless.
- Pliable.
- Lacking focus.
- Works poorly under the pressure of deadlines.

## How to influence the amiable



Demonstrate how they can help others and create a more cohesive work environment. Do not engage them in argument or conflict. Try to show how you could be part of their team or vice versa.

### Characteristics of analytical personalities

The analytical person, as the name would suggest, is the logical thinker among us. These people like agendas, structure and plenty of detail. Do not expect them to make snap decisions – they need time to mull things over. The analytical personality values precision and accuracy. They are likely to have tidy and well-organized offices with everything in its place and timetables and charts on the walls. In meetings, they tend to be circumspect and measured in their remarks, they listen more than they speak. The following adjectives describe the analytical style:

- Detail oriented.
- Disciplined.
- Thorough.
- Methodical.
- Serious.
- Logical.
- Objective.

When negatively perceived, the following descriptors might apply:

- Indecisive.
- Overly critical.
- Procrastinator.
- Over-cautious.
- Rigid.
- Remote.
- Picky.
- Secretive.

## How to influence the analytical



Do not expect snap decisions. Provide data for them to mull over. Be precise with your terms and make sure your proposal is well structured and above all, accurate.

### People buy people

This model of behavior is generally valid, but obviously, some of us will exhibit more extreme or rigid examples of a particular style given different circumstances. People may also adjust their behavior slightly depending on mood, interest, or environment. But by and large, people tend to behave in a certain way and will usually exhibit the characteristics of their style.

This is very significant to anyone working in sales, business development and customer relations. I strongly believe that in most businesses the decision to buy from one company as opposed to another, particularly when competitors are operating on a level playing field, is based on personality and chemistry. **People buy people and they buy from the companies with whom they want to work.** I have raised this point frequently in my seminars, and have rarely had any dissention.

The key to enhancing interpersonal effectiveness is adaptability. By understanding one's own style - its strengths and weak points, and the style of others, we can begin to modify our behavior to make the other person more comfortable with us. This is not in any way manipulative. It is simply recognizing the differences in the people we deal with and being flexible enough to adjust our own behavior accordingly. This is sometimes called 'mirroring' which is essentially acting in a way, in terms of speech, body language and mannerisms, which is familiar and acceptable to the other person. Simply put, if you are in a customer's office and he is sitting rather formally behind his desk with an agenda in front of him and a fairly serious business demeanor, you would probably not impress him by leaning back in your chair, crossing your arms, putting your feet on the desk and cracking a joke! So an important influencing skill is the ability to be flexible with one's own style in order to make the other person feel comfortable in dealing with you.

A

**Discussion question**

*Where are you on the flexibility scale? Are you inflexible (a 1 or a 2) or highly flexible (a 9 or a 10) when dealing with others?*

**Retail therapy?**

B

As an amusing aside, it is interesting to observe the differences in the way the four styles described shop.

The activist/expressive is the impulse buyer, much loved by retailers around the world. They will go out for a pint of milk and return with a new car. When undecided they may well buy the same item in several different colors and you are likely to see the labels still attached to new clothes in their wardrobe which they have never worn!

Diametrically opposed to this style in their shopping habits, are the analyticals who are the comparison shoppers. If they decide to buy a new car or a computer, they will read as much as they can about the different models, test drive everything they can, and generally drive the salesperson crazy before making a decision. And even when they do, they do not buy immediately, they have to think about it for a few days!

Then there's the driver, who is very direct in his shopping habits. Once a decision is made, that's that. He will buy and move on to the next activity. This person is not a browser or a natural-born shopper.

Finally, the amiable. Often this individual is persuaded into buying something he did not want, for fear of upsetting or offending the sales assistant. Amiables are usually the ones returning goods the next day, or writing a kind letter to the shop's manager, praising the service they have received.

A

**Exercise**

*Identify a potential buyer - someone you are seeking to influence towards a purchase decision. What sort of person is this individual? Can you identify his behavioral style and will you adapt your style to enhance interaction with him? If so, how?*

## How people process information

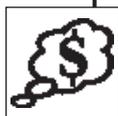
You may have come across a fascinating communications science known as Neuro Linguistic Programming (NLP). If not, I recommend you read the book *Principles of NLP*<sup>13</sup>. Authors, O'Connor and McDermott describe NLP thus:

'Neuro' refers to the mind and how we organize our mental life. 'Linguistic' is about language, how we use it and how it affects us. 'Programming' is about our sequences of repetitive behavior and how we act with purpose. So NLP is about connection, for our thoughts, speech and actions are what connects us to others, the world and to the spiritual dimension.

NLP maintains that people learn and process information in different ways. There are the visual learners, the auditory learners, and the kinesthetic learners. Visual people tend to use visual language, such as 'look here' or 'can you see my point of view' or 'I see what you mean'. Their eyes tend to look up when thinking about something.

Auditory people tend to use auditory language, for example, 'listen to me' or 'loud and clear' or 'I don't think you hear what I'm saying'. Their eyes move from side to side (i.e. ear to ear) when considering something.

The kinesthetic individual (also known as tactile) will use phrases such as 'I have a feeling about this' or 'my gut instinct tells me to go with this idea'. They tend to look down, or within themselves when deep in thought.



### Thought for your ideas bank

Next time you are in a meeting with one of your prospects, observe the language he uses and watch how his eyes move when in thought. Is he visual, auditory or kinesthetic?

## Gender and communication

There is another dimension to the psychology of selling which I would like to touch upon in this chapter and that is gender differences in communication, specifically in the workplace. This is always a provocative subject to raise in my seminars, but I have rarely met anyone who does not think that men and women communicate differently. There has been a large body of literature written on this subject, and I have recommended some further reading at the end of this chapter. One of the most interesting books I have read is John Gray's *Men are from Mars, Women are from Venus*<sup>14</sup>. I think it should be mandatory reading for anyone getting married or moving in with a partner of the opposite sex! Here are some considerations in gender differences, particularly communication:

- Scientists tracking human brain activity have confirmed that men and women process information in distinctly different ways. Brain imaging indicates that women have greater sensory discrimination than men do. They can read the emotional content in facial expressions more accurately than men. Also, when women recall sad events, they exhibit a larger area of neuron activity in their brains than men do. Women are more in touch with their emotions, more observant and more sympathetic.
- The sexes don't communicate the same way, don't shop for the same things, and don't buy for the same reasons. Men and women view the world in a fundamentally different light.
- *How* you sell to a woman can be as important as what you sell. Women tend to look for a relationship before they make a purchase. They want to know there's going to be support and personal service after they buy. This desire for connection defines not only the way women relate to companies, but how they engage the world, and ultimately, how they will change the world.
- Women tend to use 'rapport' language as opposed to men who use 'report' language. Women are more interested in establishing a bond or a rapport in their communication, men, on the other hand, tend to give or tell information with few precursors. Sometimes women apologize before making a suggestion, for example: 'You may already have considered this' or 'I wonder if I could just offer a suggestion here'. Often, this will undermine her authority, particularly in mixed business meetings, and I have often heard a woman put forward

a proposal in a meeting which has essentially been disregarded, only to have a man put forward the same proposal, but in a more direct way, later in the meeting, and have it readily accepted!

In conclusion, understanding what makes people tick and having the ability to communicate effectively and engage other people is one of the keys to success in business, particularly winning new business. Of course, if you don't have good solutions, excellent products, a solid reputation and a sound business background, you are not going to win business on the power of your personality and because people like you. But given that the other factors are present, great interpersonal and communication skills will give you a significant competitive edge.

## Summary

In this chapter we examined some keys to personality and how to identify different styles of behavior and adapt our own accordingly in order to influence a decision. Knowing what makes people tick and how you can use 'mirroring' techniques to make others feel more comfortable with you is an important factor in consultative selling to which we now turn.

## Further reading



- *Genderspeak - Men, Women and the Gentle Art of Verbal Self Defense* **Suzette Haden Elgin** (John Wiley & Sons)
- *He Says, She Says - Closing the Communication Gap Between the Sexes* **Lillian Glass** (Pedigree Books)
- *Men are from Mars, Women are from Venus* • **John Gray** (Harper-Collins)
- *The New Woman Manager* • **Sharon Lamhut-Willen** (Aslan Publishing)
- *Talking from 9 to 5 - How Women's and Men's Conversational Styles Affect Who Gets Heard, Who Gets Credit, and What Gets Done at Work* **Deborah Tannen** (William Morrow)

- *Do What You Are* • **Paul Tieger & Barbara Barron-Tieger** (Little Brown & Company)
- *Dealing With People You Can't Stand* • **Rick Brinkman & Rick Kirschner** (McGraw-Hill)
- *Why Men Don't Listen and Women Can't Read Maps* • **Barbara Pease & Allan Pease** (Welcome Rain)
- *Life Skills: Taking Charge of Your Personal and Professional Growth* • **Richard Leider** (Prentice Hall)
- *The Six Pillars of Self-esteem* • **Nathaniel Branden** (Bantam Books)



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# part three

Getting them to yes

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# chapter seven



## **Consultative selling**

Introduction

What is consultative selling?

Five things to know about your prospect

The four buying modes

Customers as partners

Managing expectations

Summary

## Introduction

*'It takes a long time to achieve instant success'*

ANON

This chapter covers the following topic areas:

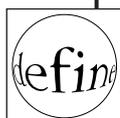
- What it feels like to be a buyer.
- A definition of consultative selling and how to become consultative.
- Understanding your customer's buying process and sourcing strategy.
- Selection criteria.
- The buying power and the buyer's sources of reference.
- Different buying modes.
- Customers as partners.
- Managing expectations.

Have you ever wondered what it feels like to be one of your customers or to be a prospective customer thinking of purchasing from you? Let me suggest the following adjectives to describe how customers might feel:

- Insecure.
- Threatened.
- Impatient.
- Worried.
- Exposed.
- Ignorant.
- Skeptical.
- Confused.

I think you will agree that these are not very positive descriptors and even though your customers may not feel all of these emotions all of the time, they will probably feel some of them some of the time. The bottom-line is that most of the time customers and clients come to you because they have a problem and if the truth were known, they

**What is consultative selling?**



would probably prefer it if the problem went away and they could just get back to business as usual. After all, the buying process is time consuming, not to mention the management of supplier relationships after contracts are signed.

It is a useful exercise to occasionally put yourself in your potential buyer's shoes and take on his mantle just to see how it feels. This is an important part of consultative selling on which this chapter will focus.

Consultative selling is essentially partnership selling. It is about selling long-term value and creating long-term relationships with customers rather than simply providing a product or service. It is an ongoing process, pre- and post-contract. People who sell in a consultative fashion consider that their existing customers are always prospects as well, and are continually seeking ways to add value to the products and services they provide. They rarely sit on their laurels and consider that the job is done once the contract is signed.

Mark Hanan, in his book *Consultative Selling*<sup>15</sup>, makes the distinction between consultative sellers and vendors, as follows:

CONSULTATIVE SELLERS	VENDORS
Supplies profit to his customer as his product	Supplies a product
Offers a return on customer's investment	Charges a price
Submits a business improvement proposal	Submits an order form
Sells to a business manager	Sells to a purchasing manager
Operates in a dedicated industry and to dedicated customers within it	Sells to a dedicated territory
Uses a database of facts and figures about the customer's business as their source of knowledge	Uses his product brochures as his sales database

### Five things to know about your prospect



Hanan also provides four key steps to becoming consultative:

- 1 Identification of the customer's problem in financial terms, i.e. what is it costing?
- 2 Quantifying a profit improvement solution to the problem.
- 3 Assuming the position of manager of a particular problem-solving project and accepting responsibility for its performance.
- 4 Proposing a partnership with the customer in applying your **system** to solve his problem.

It is very important that you understand the following about your prospective customer:

- 1 His buying process.
- 2 His sourcing strategy, if there is one.
- 3 The criteria he will apply in his selection of a supplier.
- 4 His buying power.
- 5 His sources of reference.

Let's examine each of these:

#### **Buying process**

In addition to knowing who are the key buyers in the company and who influences their decisions, it is also useful to know the customer's timetable for selection and the purchasing process used in the organization. Typically, the process may look like this:

- 1 The identification of need.
- 2 Specification of requirement.
- 3 Identification of services or products to be acquired.
- 4 Research on those companies able to fulfil the needs.
- 5 Capabilities presentations from potential suppliers.
- 6 Development of a shortlist.
- 7 Review of quotations, tenders and proposals.
- 8 Negotiation.



- 9 Selection of a preferred supplier.
- 10 Contract or order fulfillment.
- 11 Delivery and implementation.

The earlier you can enter this process the better, ideally at the needs' identification stage.

### **Sourcing strategy**

The prospect may employ one of the following sourcing strategies:

- 1 Global sourcing.
- 2 Partnership sourcing.
- 3 Single source.
- 4 Preferred supplier.

Each has its advantages, although partnership sourcing requires a commitment by customer and supplier to a long-term relationship for mutual benefit. According to Mark Hanan there are several advantages to partnership sourcing:

- Enhancing product development.
- Achieving greater quality and performance.
- Addressing market and business issues for future product planning.
- Economies of scale can be achieved.
- Sharing design and development costs.

### **Criteria**

Identifying the buyer's selection criteria is very important and should be part of the initial qualification process outlined in Chapter 4. You may find that the criteria are unrealistic or that you cannot meet them.

In this case you have a choice:

- a) suggest that the prospect revise the criteria, or
- b) remove your company from the bidding process.



Typical buyer selection criteria may include the following:

- Product track record.
- Expertise and experience of company/team.
- Any conflicts of interest or competitive considerations.
- Reputation and professional standing.
- Flexibility.
- Costs.
- Timing.
- Chemistry and ability to work together.
- Quality of references.
- Good strategic fit.

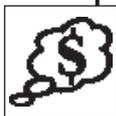


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### **Exercise**

*Identify your prospect's buying process and his selection criteria.*

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### **Thought for your ideas data bank**

Always ask your prospect what the selection criteria are and if there is a written copy which you can share with your team. If he tells you that they have not yet been developed or written down, suggest that you help with this process. For example, you could help the buyer develop ten criteria and assign a rating system of 10 points to each, with a minimum pass mark of 60 for bidders to get onto the shortlist. Clearly you need to be as objective as possible, but demonstrating your usefulness and value at this early stage, can stand you in good stead in the relationship.



### **Buying power**

Prospective customers have different levels of buying power which they can use to wield influence over you. These may include:

- Knowledge and understanding of your market.
- Size and reach of their company.
- The market share they own.
- Size of potential business they are likely to give you.
- Knowledge of your company's plans to increase capacity.
- Team-buying approach.
- Use of preferred supplier and vendor rating systems.
- Number of your competitors trying to win their business.

Again, it is useful if you can identify where this power lies and how best you can address it in your sales strategy.



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### **Exercise**

*Identify your buyer's power over you. Do any of the above apply?*

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### **Buyer's sources of reference**

Your prospective customers have several sources of reference that can provide them with information about you and influence their decision as to whether your company should be considered a potential supplier. You should ensure that you have some influence over, or input into, as many of the following information sources as possible:

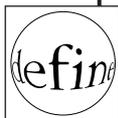
- Existing suppliers.
- Past quotations.
- Brochures and direct mail pieces.
- Trade journals.
- Trade associations.
- Vendor directories.
- Web sites.
- Exhibitions.

- Advertisements.
- Buyer’s professional trade body.
- Colleagues.
- Third party consultants and advisors.



**Here’s the bottom-line:** Stay in front of your prospects and maintain your profile in the market. You might want to refer back to Chapter 3 to review the best ways to do this.

### The four buying modes



Authors, Miller/Heiman<sup>1</sup> (see Chapter 5) refer to four different modes of buying and you should know which mode your customer is in:

- 1 **Trouble** - the easiest customer to sell. Buying timetables are shortened and decisions made quickly.
- 2 **Growth** - it is fairly easy to sell to this customer who wants more of it better, faster and easier. These are earnest buyers who are not just window-shopping or simply going through the tender process as part of compliance or because company policy dictates.
- 3 **Even keel** - these prospects are more difficult to sell to. They are not convinced they need to change or to buy from you. It might take you longer to work through the sales cycle with the ‘show me’ buyer.
- 4 **Overconfident** - put these prospects on the back burner! They are the most difficult of all to sell to and may waste your time. However, remember that overconfident buyers can often lose that confidence quickly when the market takes a downturn or when change occurs in their organizations, so keep the lines of communication open.



**Discussion question**

*Which buying mode is your prospective customer in? What strategy will you use to win the business?*

## Customers as partners



Most of us are looking for long-term customers, customers who will provide good referrals, be showcases for our products and services, and expand and grow with us – essentially customers as partners. One of the keys to consultative selling is to create clients and customers as partners and in order to do so there are several things you must do:

- Provide benefits and results to your customer's business in the form of the right products and services.
- Perform to the highest levels of excellence.
- Listen to your customers and be available to them when needed.
- Pay attention to the relationship.
- Provide opportunities for customers and clients to give you feedback on how you are doing.

Feedback is very important and I have reprinted here a questionnaire developed by David Maister<sup>16</sup> that you might wish to adapt for your own use.



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### Exercise

*Complete the following feedback questionnaire from the perspective of one of your customers. How did you rate?*

*Below 60 - you need to do some work.*

*Above 120 - you are doing well.*

---

**Customer feedback questionnaire**

For each of the following statements, please indicate whether you: strongly disagree (1), somewhat disagree (2), neither agree nor disagree (3), somewhat agree (4), strongly agree (5).

1	You are thorough in your approach to your work	n/a	1	2	3	4	5
2	You show creativity in your proposed solution	n/a	1	2	3	4	5
3	You are helpful in redefining our view of our situation	n/a	1	2	3	4	5
4	You are helpful in diagnosing the causes of our problem areas	n/a	1	2	3	4	5
5	Your people are accessible	n/a	1	2	3	4	5
6	You keep promises on deadlines	n/a	1	2	3	4	5
7	You document your work activities well	n/a	1	2	3	4	5
8	Your communications are free of jargon	n/a	1	2	3	4	5
9	You offer fast turnaround when requested	n/a	1	2	3	4	5
10	You listen well to what we have to say	n/a	1	2	3	4	5
11	You relate well to our people	n/a	1	2	3	4	5
12	You must be sufficiently informed on our progress	n/a	1	2	3	4	5
13	You let us know in advance what you're going to do	n/a	1	2	3	4	5
14	You notify us promptly of changes in scope, and seek our approval	n/a	1	2	3	4	5
15	You give good explanations of what you've done and why	n/a	1	2	3	4	5
16	You don't wait for us to initiate everything you anticipate	n/a	1	2	3	4	5
17	You don't jump to conclusions too quickly	n/a	1	2	3	4	5
18	You involve us at major points in engagements	n/a	1	2	3	4	5
19	You have a good understanding of our business	n/a	1	2	3	4	5
20	You make it your business to understand our company	n/a	1	2	3	4	5
21	You are up to date with what's going on on our world	n/a	1	2	3	4	5
22	You make us feel as if we're important to you	n/a	1	2	3	4	5
23	You are an easy firm to do business with	n/a	1	2	3	4	5
24	You deal with problems in our relationship openly and quickly	n/a	1	2	3	4	5
25	You keep us informed on technical issues affecting our business	n/a	1	2	3	4	5
26	You show an interest in us beyond the specifics of your tasks	n/a	1	2	3	4	5
27	You have been helpful beyond the specifics of your projects	n/a	1	2	3	4	5
28	You have made people more effective at what they do	n/a	1	2	3	4	5
29	My own understanding has improved from working with you	n/a	1	2	3	4	5
30	Overall I would rate your service very highly	n/a	1	2	3	4	5

Figure 5: Customer feedback questionnaire

## Managing expectations



Mismanaged or misunderstood expectations are one of the most frequent reasons why business is lost both in the tender and post-contract stages. You must know what your prospect expects from you and make sure it is realistic and you can deliver on it. I sometimes think the business development process is like a personal relationship.

You date a number of different people (researching the market), then you make a commitment to go steady with one, but still keep your options open (proposal and quotation), this leads to the engagement (negotiation phase), the wedding (contract), the honeymoon (early stages of the relationship), and the marriage (ongoing work and implementation). Sometimes the relationship fails leading to separation or divorce (contract termination) but hopefully it will be a happy union where you celebrate anniversary after anniversary (long-term customers).

Managing expectations is vital to the success of a customer relationship as it is with a marriage. Sometimes we have to compromise, sometimes there is disappointment, but the most important thing is communication between both parties.

In the next chapter I will show you how you can manage expectations in the proposal stage, but in closing this one I'd like to leave you with a wise quote from author and Harvard Business School Professor, Theodore Levitt:

*'To the potential buyer, a product is a complex cluster of value satisfactions. It is not the product per se, but rather the value a customer attaches to a product in proportion to its perceived ability to help solve a problem or meet a need.'*

## Summary

In this chapter we examined the many different aspects of consultative selling both from the bidder's viewpoint and from the customer's. In particular, we examined the different buying modes that your prospect might be in and identified several different buying criteria that you will probably need to meet in the bid process. In the next chapter we will look at the critical importance of writing compelling new business proposals which will help you bring your prospects closer to saying 'yes'.

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# chapter eight



## Writing winning proposals

Introduction

### **Part one: The proposal structure for professional service firms**

Key elements

Measurement and quality issues

Editing and review

Support materials

### **Part two: The tender process in the commercial and public sectors**

Summary

## Introduction

### Part one: The proposal structure for professional service firms

## A

*'What is written without effort is in general  
read without pleasure'*

SAMUEL JOHNSON

This chapter deals with a key part of winning new business – organizing your proposal and deciding what to include and how to write it. It is divided into two parts:

- **Part one** covers a standard proposal structure with a description of each element. I particularly recommend this approach for anyone selling professional services, but others might find it useful as well.
- **Part two** provides a detailed outline of the tender development process in the commercial and public sectors

By way of introduction to this section, let's identify the four key elements of communication which all need to be present in any communications context:

- 1 Source or sender.
- 2 Message.
- 3 Audience.
- 4 Channel.

#### Exercise

*Which one of these is the most critical and the one element to start with when planning communication?*

If you answered 'audience' you would be right. Although the other elements are very important, you should start with your audience when planning to communicate either through the written or the spoken word.

So first and foremost, consider the reader – his interests and needs. Make the document easy to follow and use language which is accessible to your reader. Avoid jargon, acronyms and technical terms which

## Key elements



are used regularly in your business, but which may be meaningless to your reader. You do not want language to be a barrier to communication. Later in this chapter I will cover style and format, but let us start with a basic proposal structure.

You may be given specific guidelines by your prospect regarding the layout, format and contents of your proposal. If this is so, you would be well advised to follow the instructions. Failure to comply may well result in your bid being marked down, or even dismissed, so follow those guidelines. However, if this is left open and you are given free rein, you may want to develop a house style that suits your business and the image you wish to project.

I have applied the following structure in many new business proposals and its logical approach has worked well for me over the years. I also find a general outline helpful, particularly when trying to overcome writer's block and when faced with a huge amount of data to extrapolate!

You may wish to change the section headings or put them in a different order, but these are the basic areas I recommend you cover in your proposal:

- 1 Introduction.
- 2 Problems/challenges.
- 3 Objectives.
- 4 Strategy.
- 5 Deliverables/implementation.
- 6 Options.
- 7 Measurement of results.
- 8 Quality control.
- 9 Resources.
- 10 Budget.
- 11 Call to action.

Let's look at each one of these sections.

**1 Introduction/situation overview**

You should start with a statement outlining your understanding of the client's needs - essentially what they have told you. In my business, this is known as restating the client brief in your own words. This is also where you can feedback the main findings of the research you have conducted and hopefully provide them with some new insights and information about their business, their operations and the market-place. This is an ideal opportunity to engage their attention early in the document and to position yourself as knowledgeable and thorough.

If you have a lot of statistical and analytical data in this section, you might consider attaching some of it as an appendix - you don't want to overwhelm the prospect and lose his attention before he reads any further.

**2 Problems/challenges**

A prospective customer comes to you by and large because he has a problem or is facing a challenge in his business. These problems and challenges as you understand them should be clearly stated in your next section. These will, of course, be the focus for the rest of the document and may again be a reiteration of the brief you have been provided, restated in your own words.

**3 Objectives**

Your next section should be a statement of your objectives, which should be measurable, specific and attached to a timetable. You may have short or long-term objectives. I would also recommend that you identify your understanding of the customer's business objectives and demonstrate how your goals align with his. It is important that you show a good understanding of their objectives and demonstrate how you will contribute and add value. A good way to do this would be to split the page into two columns as demonstrated below:

**Our project objectives**

**Your business objectives**

_____	_____
_____	_____
_____	_____
_____	_____

#### 4 Strategy

This is the section which outlines how you are going to achieve your objectives. It is the road map to success and should be very clearly identified.

#### 5 Tactics/deliverables/implementation

This will probably form a substantial part of your proposal document. This section needs to be carefully outlined and essentially sold to the prospect because every tactic, deliverable or recommendation will probably have a monetary figure attached to it. This is what you are going to be paid to do.

We have talked a lot about delivering results and benefits to customers and the importance of managing expectations. Let me show you how you might do this in your proposal:



Outline a key tactic, deliverable or stage of implementation. Then identify the anticipated result or outcome, followed by the customer benefit which will accrue from that result and finally, the critical success factor/s associated with achieving that result and therefore enjoying the benefit. This final point is important and will help you manage the customer's expectations. Critical success factors are usually associated with something the customer or client must do or agree to and may cover timing, deadlines, budget, technology, equipment, resources, etc. Here is an example taken from my own business - PR consulting:

- Conduct external communications audit of ABC's business to identify strengths and weaknesses in communications strategy and to gauge whether key messages are being effectively conveyed to target audiences.
- Result: Client will know where to make changes in message delivery to enhance communications effectiveness.
- Benefit: Better value for money in communications activities.
- Critical success factor: Access to communications plan and permission to contact key stakeholders.

#### 6 Options

You should include any proposals or recommendations which are optional and probably over and above the budget. There may also be alternative approaches to delivering particular solutions.

## Measurement and quality issues

Now we move on to what could be described as the second part of the tender document, which deals with another aspect of the proposal, that of delivering customer satisfaction. In the sections outlined above we have covered the work we hope to carry out for the prospect, in other words the advertising campaign, the bridge construction, the delivery of a new manufacturing process, the revised accounting system – depending on the business you are in. Now we must turn to an equally important aspect of winning the business and that is related to **measurement, quality and service**.

Let me quote from David Maister's book *Managing the Professional Service Firm*<sup>16</sup> which I thoroughly recommend to anyone in business development, even those who do not work for, or own, professional service companies. (See also previous chapter for more of Maister's wisdom). In his book Maister makes the following statement:

*'Quality work does not equal quality service'*



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### Discussion question

*What does the above quote mean to you and how does it relate to your business?*

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In all businesses it is vital that the service or product performs to the highest standard of excellence – this is what keeps customers coming back time and again. However, it is equally important that you deliver quality service in the real sense. In my business it means being available to the client, billing accurately and on time, ensuring there is the right chemistry with the team assigned to work with the client, reporting progress, alerting the client to change, returning phone calls, meeting deadlines, etc. We could have a great PR program, but if these other factors are not met, we will not have happy clients.



In my seminars, I always use the example of the plumber.

Imagine you have a problem with the plumbing in your kitchen and call a local plumber for emergency service on a Sunday. You speak to an unhelpful operator who says that he will get someone to you within the next six hours. You wait and wait and finally after seven hours the plumber arrives. He has a surly attitude and is obviously annoyed to have been called out on a Sunday. However, he fixes the problem and you have no further difficulties with the leaking pipes. But you feel the plumber has overcharged you, he refuses to tell you what the problem was and leaves a mess on the kitchen floor. Would you be inclined to use the services of that company again? Probably not! Even though you received quality work, you did not enjoy quality service. The same principle applies in just about any business.

Let's now examine the sections in your proposal which should cover this aspect.

### **7 Measurement of results**

This is where you demonstrate your accountability to the customer for the work you carry out. It is vital to show him what results you hope to achieve and how you will evaluate them. Make sure those results are related to objectives and have benefits attached to them.

### **8 Quality control**

Your prospects will want to know what quality processes and procedures you have in place and these should be clearly stated. They may relate to staff training, checks and balances, health and safety, or even how you answer the phone and being available when needed. You may have achieved ISO 9000 or have been awarded Investors in People. Everyone will have different quality service programs and they should be included in your document to demonstrate professionalism and a high standard of service.



## 9 Resources

In this section of the proposal you should identify any of the following relevant to delivery of your solutions:

- The people who will be working with the customer with titles, roles and brief biographical details for each of them.
- Technology.
- Equipment.
- Space.
- Third parties to be used in outsourcing.
- Subcontractors.

## 10 Budget/financial arrangements

This is usually put towards the end of the proposal and is often the section which gives rise to most discussion and dissent. You may be told by the prospect how to present the financial data, or you may have a company policy dictating how this should be presented. I like to produce my budgets in a spreadsheet format which shows the buyers what is being proposed, when it will be implemented and how much each activity will cost. Each recommendation should directly relate to the tactics/deliverable section.

This is just one way to present a budget, but you may find it helpful in winning business, because it gives the prospect more control than a single stated figure.

Task	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	TOTAL
A				\$		\$						\$	
B			\$				\$		\$				
C	\$												
D	\$			\$							\$		
E									\$				
F									\$				
G												\$	
H	\$			\$		\$							
I		\$									\$		
J							\$						
K		\$								\$			
<b>TOTAL</b>													<b>BUDGET TOTAL</b>

Figure 6: Proposed budget for Project X – time line and cash flow



**11 Call to action**

You will probably not call this final section by the title I have proposed, but that is what it essentially is. This is where you ask for the business and provide next steps in order to get your prospect to a ‘yes’ decision. You need to give the prospect reasons to buy from you. Perhaps you create four compelling UVPs under the title of ‘Why us?’ In the rest of the document you have focused on the customer and his needs, now it is your turn to focus on yourself and why you deserve to win the business. I recommend that you conclude the document with this section. Remember the greatest sin any salesperson can commit is failing to ask for the business!

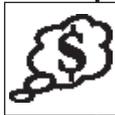
For more information on asking for the business, refer to Chapter 10 and closing strategies.

**A****Exercise**

*Develop a bullet-point outline for your proposal using the previous headings as a guide.*

**A****Discussion question**

*Why should your prospect buy from you? Identify five good reasons.*

**Thought for your ideas bank**

Develop a pitch schedule to include deadlines for key activities, such as meetings with the prospect, research, proposal writing, edits, development of presentation, etc. Work backwards from the date when the document must be delivered and make sure everyone on your team has a copy and adheres to it!

**Editing and review**

Your pitch schedule should accommodate at least one day for editing and review of your proposal document. Check for grammar, spelling, syntax and style. If several people have contributed different sections, you will probably need to review the document for consistency in tone and style. Ask at least one other person to read it through, it is surprising how many errors a second pair of eyes can find, even though you may have thought it was word perfect.

One of the worst scenarios I can imagine is flicking through the document as you wait in the prospective customer's reception area, only to discover two typos on the first page! Even worse are typos and errors on one of the presentation slides, magnified and lit for the entire customer team to see! We'll be talking about presentations in more detail in the next chapter.

## Support materials



You might also want to attach to your proposal your company credentials, appendices, terms of business, contract, letters of reference, etc. I would suggest that these go in a separate binder or folder and that they are all clearly marked for ease of reference.

You will have noticed that the key elements I have outlined for your proposal document do not include information about your company or your company credentials. I have assumed that this would have been covered as part of the short listing process and that the proposal itself should be focusing on the prospect's business and not your own. If this is not the case, then by all means include an outline of your company, its products and business at the beginning of the document or in an appendix.

Another issue might be whether to include a sample contract or indeed, the contract itself. This is your decision, but if you do include it, then you must be prepared to discuss your terms of business in the document.

## Part two: The tender process in the commercial and public sectors



My training colleague at Hawksmere, Jeff Woodhams (an independent consultant in the fields of tendering and procurement), runs a very successful seminar entitled *Competitive Tendering* which covers the bid and tender processes in the commercial and public sectors. The following is an extract from this program included here with the kind permission of the author:

### 1 The contents of a tender document

Your client wants to know when he reads your proposal:

- What he is going to get,
- When he is going to get it, and
- How much he is going to have to pay?

These questions are answered in the sections dealing with technical, management and commercial matters respectively.



There should also be a summary to give an overall view of what the customer is being offered and this is often called the Executive Summary. In smaller proposals it might simply be called the Introduction.

Larger proposals may well have each section bound separately. Even in smaller projects it is often a good idea to make each section clearly separable, because the customer may well split his assessment of your bid between a number of different individuals or departments. Again, make sure you follow any explicit instructions concerning how the document is put together, since the customer may well wish to copy particular sections, which becomes difficult if you have used some patented glue binding!

## 2 Executive summary

For anything but the smallest proposals a summary overview should be included at the beginning of the proposal. This is particularly important if the proposal is being presented to a new client. This overview is often given the name Executive Summary. It should cover all the key points in the proposal and should be aimed at senior executives. Those people are too busy to read all the details, but they need to receive the impression that you have the necessary expertise, financial backing, management capabilities and resources to handle the job. They should not come away with any doubts in their minds on these issues.

You therefore have to demonstrate that you understand the client's needs and that you have an achievable, value for money, low risk solution to the customer's requirements.

The overview should be written by a senior person, and should not be delegated to a junior manager. It must be brief and to the point and each paragraph should cover different key issues.

Remember that it may be copied on its own, without the rest of the bid, to other decision-makers within the client's organization, so make sure your own organization is clearly identified within it.

## 3 Technical section

The ideal technical solution demonstrates total understanding of the customer's needs. It has to convince the customer that it will deliver the results promised. It should be completely compliant with what the customer wants. Ideally, it should play back the customer's preferred solution. This is not the time or place to be innovative - if you know that your customer wants a particular piece of kit or way of doing things then offer that, not something else.



Showing that you understand what the customer requires depends on what he has given you – a full formal specification or merely a telephone request. If you have a full specification document, you need to explain how you have interpreted it, confirm that you have included any clarification received subsequently and then describe the technical basis for your bid. If, on the other hand, you have only received a brief verbal request, you should list the customer's requirements and objectives as you see them. Include what he is likely to achieve from what you are offering him. If you don't know, ask him. If you still don't know you are probably wasting your time.

You then need to describe what you are offering the customer, whether this is plant, services, works, software or facilities. Your main solution must be compliant with his requirements. If you feel you have a better solution which is non-compliant this should be included as an alternative offer, not a replacement for what the customer thinks he needs.

You may need to explain how you arrived at your main solution. If necessary, explain your method of working, the main sub-contractors you will use, and any innovations that you believe confirm your ability to achieve the desired results, but do be careful not to raise questions in the customer's mind.



Your prime offer should be just adequate for the job. This encourages the customer to believe he will be getting value for money. When you review your proposal before finally issuing it you must remove any frills or gold knobs that have been designed in.

Your offer may well require input from the customer – perhaps special tooling or strategic spare parts. You may require facilities that the customer owns. You will almost certainly require information and possibly approval from the customer to what you are doing. You must spell out in your proposal what you require and when. It may be useful to keep a checklist of what you normally require or the timescales you normally work to, and to include this, or extracts from it, but do remember to keep this under review to allow for changed circumstances.



When you are tendering to new clients or for new types of work, it may be useful to have another type of checklist. In order for you to be compliant your offer must be complete and the list will help ensure that you do not omit anything. You could include items under the following headings:

- Spares, maintenance, guarantees, warranty.
- Quality requirements (ISO 9000).
- Safety.
- Training.
- Operational factors.
- Environmental impact.
- Security.
- Disposal of equipment.
- Public liability.

If you want to know what to include in the list, ask your customers what was omitted from previous proposals. This not only validates the checklist, but also demonstrates to your customers that you are trying to improve your performance.



You also need to include the technical messages you wish to put across. They should reflect what is best for the project and may include:

- the best technical solution, the best plant, the most skilled workforce;
- the low risk of the proposed solution;
- the soundness of the design;
- the thoroughness of the analysis done; and
- the logic of your approach.

#### 4 Management section

This is the section of a proposal that most often gets omitted, which loses business, because it is this section that convinces your client that you are able to manage the project successfully. You need to cover quality, program and control. You want the client to feel confident that you can be relied on to get on with the job without giving him problems.

Quality can be demonstrated by referring to the relevant standards, most notably the ISO 9000 series, but you may need to say more in the light of what you know about the customer. Explain the ways in which you're spreading the quality message throughout the whole of your organization. If you have a total quality management policy spell out what it contains. If you run quality circles explain this. But do make sure that you have dealt with all previous concerns if you are tendering to an existing customer. If necessary, get feedback from him on how he views previous projects. Also make sure that, if you are promoting a quality image, this includes the presentation of your tender documentation, the way in which telephone calls are handled, the reliability of message taking, etc.

Project programs are best covered in charts. Bar charts can be very effective, but ensure that the information on them corresponds with the technical description. More complex programs may require the submission of other charts, such as PERT diagrams, although these more detailed documents will often follow the award of contract. If you are concerned to cover response times for a continuous service, then you may simply need to state the service levels offered.

Don't be afraid to state the obvious. If you can meet required delivery dates, say so. Silence may be assumed to mean non-compliance. If you can better the required delivery, make sure this is of benefit to your customer before offering it - it may just present him with an additional problem. If you can't meet the delivery, again say so - customers always prefer to know the worst as early as possible, and it may well be that he has requested the impossible.

If you are being asked to accept liquidated damages, be very careful about what you are offering and the rate and extent of the damages you are prepared to accept.

The third topic for the management section is the question of control. Personnel skills, equipment and management all should be mentioned to convince your client that you could do the job. Identify the main sub-contractors you will be using and consider getting them to contribute to the proposal.

It may be appropriate to describe your organization in so far as it is relevant to the project. You may include CVs of key personnel, but remember they are selling CVs, not job-seeking CVs. Only include the details that are relevant.

After reading the management section your client should be convinced that you are a well-organized management team, where each component knows its place and is under the necessary control.

## 5 Commercial section

This part of the proposal needs to show your customer that you are offering the best commercial deal. Make sure here, as in other sections of the proposal, that you are describing something special to your organization. If the competition offers a better deal than you in some respects don't dwell too long on those items! So in order to avoid highlighting an aspect in which you are not strongest you have to be aware of your competition's strengths as well as their weaknesses.

The commercial section needs to cover:

- Pricing.
- Payment.
- Terms and conditions.
- Other relevant factors.

You should address only matters of interest to the customer. For example, the financing of a \$50,000 job is unlikely to be an issue, whereas it probably does need to be mentioned for a \$25,000,000 project.

Of course the most important part of a proposal is generally the price and you need to think about how to present this. If you have a definite specification then you must quote the full price for meeting that specification. If you wish to offer alternatives (probably reductions) then do this in conjunction with options put forward in the technical section. On the other hand, if you have a functional or target specification to meet, then put your lowest price first and justify that. If this offer complies strictly with the stated requirements then say so. Desirable features can then be offered at an additional price.

Throughout the pricing section keep referring to the technical section and make it as easy as possible for your customer to correlate the two. As this is likely to be the most read part of the proposal, don't lose the opportunity to sell your offer here.

After the price you must spell out when you expect your client to pay you. Failure to do this leads to inevitable conflict later in the job. You

may well have been told when you can expect to be paid and you need to think twice before requesting any amendment to this - the customer may load your offer disproportionately if he thinks that you are going to cause him administrative difficulties. You must also be realistic - clients will have payment systems, look at industry norms and their own cash flow position in determining when you actually get paid. Your pricing must reflect what you know about the likelihood of being paid in line with the stated terms.



Other factors to consider about payment are:

- How (electronically, check, bankers' draft, goods in kind, etc.).
- In what currency.
- Where.
- Documentation required (e.g. Engineer's certificates).
- The retentions to be held.
- Risk of non-payment.

These become particularly important in dealing with overseas customers.



Next you should mention terms and conditions - anathema to most salesmen! Typical of the topics to be covered here are:

- Delivery of parts from your customer and the impact of delays.
- Approval of drawings/programs/specifications by the customer or his engineer and the timescales required.
- Delivery arrangements to your customer.
- Who owns any resulting intellectual property.
- Confidentiality of information and publicity.
- Where and when ownership changes hands.
- When and where risk passes from one party to the other.
- Force majeure.
- How, when and where acceptance of the work or plant or services is to be signified.
- Whether the contract can be varied, how, and to what extent.
- Dispute resolution/arbitration arrangements.

- Which country's law applies.
- How long your offer remains open for acceptance.
- Special provisions for overseas contracts, especially who is arranging import/export documentation, permits, letters of credit, transport, shipping, etc.

In all sections of your proposal it is most important to be very clear about what you are offering and what you expect from your client. You must be consistent between sections, concise and unambiguous. The proposal must be as easy to read as possible so use plain English. Legalese or jargon may not be understood and if the client does not understand your offer that leaves him with a question mark.

## 6 Covering letters and other materials

Your proposal should be complete in itself and therefore any covering letter should be kept very brief and to the point. It should refer to the relevant correspondence from the customer and should also list any other materials enclosed, such as general sales brochures, reference portfolios, photographs or videos. These documents need to be marked individually as being part of the package and all should bear your organization's name.

Do find out again what your customer expects from you. If he has issued formal tender documentation that may be all that he wants returned. The normal place for general sales literature is before you get onto the tender list. Try to fit the material enclosed with what is expected.

## 7 Presentation and appearance

The physical size of the document to be presented does not necessarily relate to the value of the contract - this will largely be determined by the customer's instructions and expectations. However, your proposals should always be presented professionally in order to gain respect.

Your proposal is going to be read, so you must help the reader as much as possible. The reader needs an indication of where he is, and how far he has to go. You should therefore give him:

- Titles that have meaning.
- Headers and footers that give positive guidance as to where you are in the document.
- Key sentences, stating your claims, heading each paragraph.

Being consistent helps the reader considerably. Try to keep to one style of headings, diagrams and text throughout the whole document. A common format should be used for most, if not all, the text. If you are preparing a series of proposals then the same guidelines should be followed.

Consider an appropriate binding for the document. Pages must lie flat and will often need to be photocopied, so any fancy glue binding is probably not appropriate. Simple staples may suffice for a small tender. For larger proposals a ring binder is often a good choice.

Consider what you should include on the front cover. Remember this is the first thing your customer will see. This may be dictated by your organization's policy or by the customer's instructions. Otherwise consider:

- The project name.
- A project photograph, sketch or drawing.
- Your organization's name.
- A statement of what the document is, i.e. 'A bid for ...'.
- A reference number for the document.



After the cover comes the first page with real information. Again this may be fixed by the customer or by your own house style, but consider including the following:

- **References:** organization name, what the document is, what project it refers to, any cross references to other proposals, the enquiry reference and the document's own reference number.
- **Quality assurance:** issue number and date of issue, whether it is a controlled copy, if so, whose copy it is, name and signature of the author or proposal manager, name and signature of the person who authorized it.
- **Contact details:** name and address of the technical person for questions and the same for commercial questions.
- **Confidentiality:** statement of the level of security and who can copy it.
- **Copyright:** what restrictions are placed on the information as it is presented.



Remember that your proposal is copyright material. You do not need to put anything on the document but if you wish to retain copyright it is worth including a statement claiming ownership.

Often the information in a proposal is proprietary. If you want to protect your information, a suitable sentence should be included such as the following:

*The information contained in this tender is to be considered proprietary information. It shall not be reproduced, disclosed or used without prior written permission of (your organization).*

You may then want to include a **Contents page** listing what is included in the proposal and the order in which it is laid out. This is obviously more important for larger proposals.

Then you may want to consider an **Introduction**. This is a statement of the objectives and is useful to give the reader guidance as to why the document has been produced.

The **Scope** defines the extent and limitations of the proposal and would list any restrictions, exclusions or limits to its use. Both these have their uses and can be properly employed on large proposals. In smaller tenders, having both can be overkill.

A very effective feature is the **Message from the Managing Director or Chief Executive**. This is most important for large jobs or for significant new customers. It is there to stress enthusiasm, willingness and commitment from the top. Generally it need only be three or four paragraphs long but it should be signed.

For some jobs consider including a **Glossary of Terms**, abbreviations, etc. This may be especially useful if you are sending a proposal overseas, where the first language is not English. Alternatively, this can be included as an **Appendix** at the end of the proposal.

Then you should include the three main sections discussed above: technical, management and commercial.

## 8 Adding pizzazz

You can always improve on your presentation. You are looking for ways to make your presentation more appealing to your customer, but you must be careful not to go too far and put him off. A number of companies submit such expensive documentation that many clients immediately think they will be too costly and rule them out.

You must make sure that you fit the project concerned and fulfil the needs of your customer. You have to use a bit of show to distinguish you from the competition, but this must be done in a controlled manner. What you need to do is largely dictated by the type of organization you are and the type of project you are tendering for. The suggestions that follow will in the main apply to proposals where you have the say in the presentation.

Look at the front cover of your proposal and consider whether you can use a bit of color. Color ink jet printers are very reasonable these days. You may be able to put some sort of photograph or drawing on the front cover. The cost is minimal but the effect is dramatic. Consider incorporating your customer's logo or his project logo, but make sure that he does not object first. Perhaps use a stylistic sketch of the ultimate application. Remember, your proposal will need to be sold inside your customer's organization right up to the Board and first impressions count.

Consider putting some form of identification down the spine of the binder if space allows. This will help it stand out in a bookcase and keeps your name continually in the customer's mind.

Consider the appropriate **paper size**. Europeans expect A4 - it's what their photocopiers handle, but Americans may expect their standard sizes.

As for the **text**, this covers the typeface and the layout, choose both with care. A two or three page bid can be successfully presented using a common typewriter font and layout. On the other hand a 100-page proposal will need to take account of potential reading fatigue.

A multiplicity of **fonts**, in a multiplicity of sizes, multiple columns, graphic inserts and the advent of cheap desktop publishing has opened up many possibilities for layout. However, with them come potential new problems.

Become familiar with what you have available in-house, and how to use the facilities. There is a tendency to use all these new facilities at the same time, but this is a mistake. It is better to stay with one type style with a limited number of sizes in one document and restrict the number of different typefaces used in a document.

Proportional **spacing** allows more characters on a line, but beware that too many characters to a line can cause the reader to misread. 60-65 characters per line of text should be a maximum. Using multiple columns can overcome this. Two columns is the best choice as three columns can often produce awkward hyphenations and may constrain the length of your titles. Titles should not be allowed to flow over two lines.

Derive a set style for the layout of the document such that all sections appear consistent. Typically you could specify:

Section titles: 18 point and centred.

Headings: 14 point, bold and left justified.

Text: 12 point and justified.

Consider incorporating **graphics** into the text. This has the added advantage of breaking up the text, making it easier to take in, and allowing the text to reinforce the graphics. If you are producing CVs in the **Management Section**, you might use photographs inserted into the text. If you have a graphic artist, consider using him to draw thumbnail sketches of the people involved in the project.



Your major selling points should be highlighted and one of the best ways of doing this is by using boxes inserted into the text. Inserts are the parts of the text which are initially read and will be read by those who are just skimming the document.

Look at various magazines to see how they do it. The PC magazines use this technique frequently to good effect. Other magazines which reflect the latest fashions in layout and text design are the Sunday papers, magazines and the weekend editions of the dailies. Study these and extract ideas that catch your eye. Also look at company reports for various large public companies. These are generally expensively produced (with a few notable exceptions) using the latest designs, graphics, etc. They are examples of what is in fashion at the moment in business and can be an excellent source of ideas. Your customer's annual report can also indicate the style that will appeal to him in your proposal.

**Pictures** convey far more information than words and should be actively encouraged. A graphic artist is a very useful addition to a proposal writing team. Imagination and innovation should be allowed but you must keep the correct tone throughout the document. A proposal is a serious document and control must be retained.

The use of **cartoons** can be effective, but this is a more tricky area. This very much depends on the customer and on how well you know him. If there is any doubt then it's best to leave cartoons alone.

**Color** in graphics and photographs can be a positive addition. Make sure though that you supply enough copies to your customer. If he has to make copies himself, the color originals you supply will stay in a drawer while muddy black and white photocopies will be the ones circulated to his Board.

The **Executive Summary** is the one part of your proposal which will be read in full by your client's decision-makers. Treat it therefore as something special. Consider making it a separate document. A more glossy presentation with many graphics in it could be the best way for some customers. For substantial jobs, a short video could be made. Alternatively, consider a multimedia presentation on computer, but make sure the customer can use it - standards are not yet uniform in this area!

**Video** is often seen as having an enormous price tag, but it need not be so. A short video can have great impact; it is a superb communications medium. The video can have certain stock sections about your company with suitable inserts relating to the proposal. It can tell your story and can be tailored to highlight your strengths. It can show your facilities in the most favorable light. It can illustrate the major points of your proposal and it will show your customer that you are one jump, at least, ahead of the competition.

More pizzazz can be added to your proposal in a variety of ways and it is up to you to work out the best for your client. Keep up-to-date with the latest graphic trends, see what others are doing and adapt it to your particular needs. Your document is a reflection of your organization's image and you can use some of the techniques above to promote who you are and what you are selling.

**Summary**

Your proposal or tender document is a key ingredient in winning new business and you should take great care to ensure it meets the highest quality both in content and in presentation. Hopefully, the detailed outlines contained in this chapter will guide you through the process, whether you are bidding for accounting services, the construction of a new highway, or a major IT project.

# chapter nine



## **Winning the business beauty parade by making effective presentations**

Introduction

Preparing the presentation

On stage

Ten useful presentation tips to remember

Overcoming nervousness

What to wear

Ask for the business

Summary

## Introduction



*'The secret of being boring is to say everything'*

VOLTAIRE

Most new business pitches often include a verbal presentation as part of the supplier selection process. This is colloquially called the 'business beauty parade'. This chapter will focus on preparing, delivering and following-up that presentation. However, if presentations do not form part of your pitch process, I hope you will still find the information in this chapter useful. I believe that the ability to make effective and compelling presentations and to be confident when speaking in front of an audience, is a key business skill.

### **Some useful pointers to start:**

- Arrive early and get comfortable with the room in which you are presenting. Find out in advance where the lighting, audio/visual and microphone controls are located and how they operate.
- Memorize your opening remark, but not your entire speech. Fear of forgetting generates tension and creates an unnatural delivery.
- Use 3cm x 5cm cards as a reminder of the points you want to make. These sit comfortably in the palm of the hand and are not as distracting as a sheaf of papers. An added advantage is that they do not become a barrier between you and the audience, which a written script often can. Another option (which I personally use) is to refer to your slides or overheads as a prompt to the points you wish to make.
- Always limit your presentation to the allocated time, unless your prospects ask you to extend.

## Preparing the presentation



Good preparation of your presentation is very important and will help you shine on stage. It will also help you overcome, or at least, control nervousness. It is quite natural to feel somewhat anxious before speaking in front of an audience, but if there is too much anxiety your effectiveness as a speaker will be significantly impaired. I will talk about ways to reduce nervousness later in this chapter.

One of the key areas you should address in your preparation is your objective. Clearly, your main objective is to win the business through a compelling and effective presentation, but there may be some interim steps to be covered before you can do that. You should ask yourself the following question: 'What do we want the prospect to do at the end of, or shortly after our presentation?'

The following is a checklist of questions that should be addressed prior to the big day:

- Where will the presentation take place? If it is on the customer's premises or in an outside meeting room, do try to take a look at it in advance. Check ceiling heights, acoustics, lighting, size and general arrangements.
- What equipment will we need and does it work satisfactorily?
- Who will attend the presentation from the customer side? Do we know all the participants and the roles they play in the organization? (I would raise a red flag if there are several names on the client selection team that you do not recognize. You should have met most of the people attending the presentation on the buyer's side.)
- How long will we have to present? How long will the Q and A session be?
- Who else is presenting (i.e. the competition?) Where are we in the beauty parade line-up? If given a choice, I like to be first if all competitors are to be seen on the same day, and last if they are to be seen over a period of several days.
- Does the prospect want to see the proposal in advance of the presentation or can we deliver it on the day? Again if given a choice, I like to provide the document after I have presented the main points contained within it. In this way, I feel I have more control over the situation.
- Who will present from our team and what roles will they play?

- What questions are we likely to be asked and how will we handle them, particularly the negative ones? Prepare a Q and A document anticipating all the questions the prospect is likely to ask and review this thoroughly with your team. If there is one area which you consider could be particularly problematic, you might want to raise it yourself before the prospect does. In this way, you have more control over the agenda - always important in potentially hostile situations!



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### **Exercise**

*Before you make your next new business presentation, answer the questions above. Be specific with your answers.*

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### **Audio visuals**

You will most likely use audiovisual support materials in your presentation and this should be prepared with as much care as your proposal document. Research shows that we are more likely to absorb information if we hear and see it at the same time.

You have a wide choice of audio visual equipment including:

- Overheads.
- Desktop presentation.
- Flip charts.
- Power Point.
- 35mm slides.
- Video.
- Props.

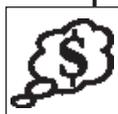
Try to follow the 'rule of five', which means no more than five bullet points per slide or chart. Avoid too much detail and complicated graphics - you do not want your a/v materials to be a barrier to communication. I would also recommend that you consider using props. They can add a little drama to your presentation, and keep your audience interested. For example, if you are tendering for a bridge building contract, show them a model of your bridge. If you are bidding on an advertising account, show the client a mock-up of your proposed ad campaign.

### **Rehearse, rehearse!**

A good actor (and even a mediocre one) would never go on stage for a first-night appearance without thoroughly rehearsing his lines, cues and entrances. To perfect your presentation you should rehearse at least once and, if possible, with an audience made up of your colleagues. Rehearsals are particularly important in the following situations:

- 1 When you have younger, less experienced members of your team who have never presented before.
- 2 When you have a complex presentation which will run more than 20 minutes.
- 3 When there are several presenters each covering different aspects of the proposal.
- 4 When there are negative or difficult issues which must be addressed in the presentation.

You should seek feedback on content, delivery, body language, team cohesion, use of a/v and handling of questions and interruptions. Do not think that rehearsing means that your presentation will be stilted or that you cannot be spontaneous on the day. It just means that you and your team will have the confidence and insight to present in a professional and effective manner.



### **Thought for your ideas bank**

If you can't get an audience, make a video of your presentation and do a self-critique. You do not need to spend a lot of money making a professional copy, simply use a mini cam on a fixed tripod.

### **Preparing for the unexpected**

Another part of preparing your sales presentation is to develop a list of issues - both positive and negative that the prospective buyers might raise. You should be clear on your responses to these, particularly to the negative points. I like to make a list of the likely, and unlikely, questions the client may ask with a position on each of the answers. You should also decide whether you should pre-empt the prospect in terms of raising negative issues. In this way, you may be in a better position to drive the agenda on the less positive points of your pitch.



### Exercise

*Before your next presentation, prepare a list of the questions the prospective buyers might ask (positive and negative) and outline your answers.*

## On stage



Now you and your team are ready for your appearance and I hope the following presentation pointers will be invaluable to you, not only for your new business pitch but also for any public speaking encounter. Let's begin with your entrance, remembering that those first few seconds are important in both how you are perceived and the attention your audience will pay you during the rest of your talk.

Shakespeare and other great dramatists knew the importance of entrances and exits. Let's start with your entrance:

It is very important to use the right 'entry language' to give the impression of confidence and command. This means that when you walk into a room, or up to a podium, or simply stand up to deliver a presentation in a meeting room, you are aware of your posture and use positive body language to put your audience at ease. These include:

- Straight back.
- Firm eye contact with your audience.
- A smile.
- Head up and facing your audience.
- A short pause to engage their attention before you begin.

You might also remember the old preacher's formula, which has been referred to for many years as part of presentation skills training:

- Tell them what you are going to tell them.
- Then tell them.
- Then tell them what you told them.

This essentially means that you give your listeners a road map by firstly outlining your agenda, then following your points in the order you outlined, then finally summarizing your key points. This is a very effective way to give a speech or presentation; it puts your audience at ease and provides a simple structure for your talk.

Another way to engage your audience is to start with a powerful opening, either challenging or amusing. You might also consider relating a common experience in order to establish a communication 'connection'.

### Using your hands

Many people are worried about what to do with their hands when presenting and I've seen presenters make these common mistakes:

- Gripping the flip chart as if it were a life raft.
- Standing stock still like Mr. Plod the Policeman.
- Wringing their hands in nervousness.
- Standing with their arms behind them as if accompanying a member of the Royal Family on a museum tour.



You can use your hands to add emphasis to your points and create space and drama in your presentation, but don't over do it! The following gestures are positive and can support your message:

- Arms and hands outstretched: denoting we have a problem or challenge.
- Finger pointed towards ceiling: but we have a solution (though do avoid pointing directly at anyone in your audience).
- Hands on chin when someone is speaking: I am listening to what you are saying.

Think about making hand movements that occur naturally to support what you are saying.

### **Ten negative gestures to avoid when presenting**

- 1 Gripping the sides of chairs, tables or your knees.
- 2 Toying with pencils, water glasses, buttons or microphones.
- 3 Drumming fingers on the tabletop or podium.
- 4 Casting your eyes towards the ceiling.
- 5 Slouching posture.
- 6 Closing your eyes.
- 7 Backing away from the audience.
- 8 Swiveling in a chair or moving legs and feet constantly.
- 9 Staring out of the window or into space when another member of your team is speaking, (or even worse, when you yourself are speaking!).
- 10 Constantly turning your back to the audience.

Equally important, if you notice a member of your presentation team doing any of the above, do let them know either privately during the presentation, or afterwards. Such bad habits need to be nipped in the bud!

### **The four C's of good presenting**

All good presenters know the four C's of presenting:

- 1 Clarity.
- 2 Control.
- 3 Consistency.
- 4 Confidence.

#### **Clarity**

This is very important. First of all people must be able to hear you, and secondly understand you. If you have a tendency to speak softly or mumble so people have to strain to hear what you are saying, you must make a conscious effort to raise your voice and to speak from your diaphragm. A good technique to overcome this problem is to imagine your audience is at the far end of the room and to speak at a volume which they can hear. A good structure, a clear speaking voice, a good pace to your presentation and the avoidance of 'umming' and 'ahhing' will help to ensure that they understand you and that you keep them focused.

### **Control**

Is just as important and there are two elements to this. Firstly, the control you have over yourself and your materials. It is important to have ownership of what you are presenting so that when you throw up a new slide it does not come as a surprise and, equally, when you are asked a question of clarification on what you are saying, you are easily able to answer it. The second element of control is external – control of your audience. This means that you know where your audience is mentally at every point of your presentation. Are they interested, confused, annoyed, bored, distracted, listening enthusiastically? You can gauge audience dynamic through body language and particularly facial expressions. You must pace or change your presentation accordingly. For example, if they look bored or distracted, maybe it's time for a break or for some questions.

### **Consistency**

Consistency in your presentation helps to keep your audience focused and clear on your messages. You must make sure that you cover all your points in a consistent way and that you keep coming back to your key messages. You must also ensure that you are not duplicating or contradicting what a fellow presenter is saying. Again, a thorough rehearsal will help avoid this.

### **Confidence**

Confidence in yourself, your product or service, and in your organization is paramount. This should come across in the way you enter the room, in how you interact with your prospective buyers and your own team, as well as how you handle questions, interruptions and conflict. By the way, I'll discuss handling conflict and unwelcome interruptions later in this chapter.

### **Your voice**

We have already mentioned the importance of speaking at the right volume to be clearly heard, but there are some other factors about your voice that you should also remember. These are pace, tone and pausing. Try not to speak in a monotone that will send your audience to sleep, pace your presentation to keep them engaged. This means sometimes you will emphasize or stretch a word or sentence, sometimes you will raise or lower your voice, and sometimes you will slow down or speed up. In most sales presentations or pitches you will use a conversational tone of voice, rather than that used when giving a speech or oration.

Great dramatists and actors have long known the power of the pause and you should use it to add drama and emphasis to your key points. Pausing is a very effective way to engage your audience on a point you are about to make or have just made. Just two or three seconds (count the beats in your head) and you will be surprised at the alert faces and focused attention in the room. Try it next time you present.

### **Handling conflict and interruptions**

The thought of possible conflict and disagreement generally creates a good deal of nervousness and concern in advance of a sales pitch, but it can be an opportunity to address and overcome customer concerns and can be turned to your advantage.

Conflict can come in one of two ways: You have made a point and the customer raises his hand in disagreement or confusion. If you have done your homework you should have anticipated this problem and will be in a position to tackle it. Perhaps other members of your team can contribute as well. Hopefully it will lead to some debate and then resolution on the issue.

However, conflict can rear its head in another way, which is often less easy to deal with. Imagine you have just covered an important budget or delivery issue and one of your buyers (let's call him Jack) is shaking his head and looking very concerned, or raising his eyes to the ceiling. No words are exchanged, but you have the distinct feeling that things are not going well. How do you handle such a situation?

If you ignore the unspoken concern, it will not necessarily go away, so my advice is that you address it. Now, this is your judgement call and

you have a choice of one of the following, depending on the situation and the personality of the buyer in question:

- You could ask him what his problem is (politely of course!).
- You could pause and open the presentation up to questions.
- You could pause and ask an overhead directed question, which means you ask a question openly and then direct it to one person, e.g. 'I have just covered an important delivery consideration, does anyone have a problem with the timetable? Jack, how about you?'.
- You could wait until the end of the meeting and then take Jack to one side and address his concerns.
- You could ask another member of your team to address the problem later on in the presentation.

Another problem you might face is constant and unnecessary interruption from one person. This, again, is difficult to deal with as you do not want to alienate or insult the individual but you do want to get on with your presentation and it is quite possible that the interruptions are annoying to everyone, not just you.

I would start by politely requesting that the interrupter wait until you have finished your presentation at which time you are sure his concerns and questions will have been addressed. If this does not work, you need to ask a little more firmly that he refrain from interrupting. As a last resort, you might tell him that his interruptions are causing you to lose your train of thought and are very distracting. In my personal experience whenever things have got this out of hand, another member of the client team has usually stepped in to the rescue!

**Ten useful  
presentation tips  
to remember**



**1 Bridging**

This is a very useful technique to get you back on track if you are asked a question which is negative or off your agenda. The way to remember bridging is through the acronym ABCD which was described in Chapter 3.

**2 Rule of three**

This is a powerful technique which provides three stages in the development of a point. It essentially builds a climax across three stages with the final emphasis being placed on the third and last.

**3 Flagging**

This technique alerts your audience that you are making an important point; you are essentially raising a figurative 'flag' to garner their attention. For example, 'the most important issue facing our industry today is...'. Or, 'if there is one thing I want you to remember today, it is this...'

**4 Use personal terms**

Speak in terms of 'I', 'we' or 'us' rather than in the third person. This establishes empathy and indicates to your customer that you are already working on his team.

**5 Use positive visualization**

This adds drama and emphasis to your presentation. For example, 'Imagine if we were able to build this machine together, a machine which would...'

**6 Props**

If appropriate, try to use props to support your presentation. They can add drama and emphasis and are a good way to keep your audience from getting bored.

### **7 Accessible language**

Make sure your language is accessible to everyone in the audience. Avoid jargon and technical terms that people may not understand. Every business has them and most of the time they are meaningless to the rest of us.

### **8 Sound bites**

Pepper your talk with memorable sound bites. We have become selective listeners as a society, and whether we like it or not, we live in the age of the sound bite. Essentially this is a nugget of information conveyed in a succinct and memorable way.

### **9 Know your audience**

This should be a mantra for every presentation. You should always tailor your presentation to suit the needs and interests of your audience. This is where all effective communication begins.

### **10 Positive image**

Don't forget to SMILE!

*The New York Times* did a survey some years ago asking people what they feared most in life. The list of fears included divorce, death, losing one's job, moving home and public speaking. Guess which fear topped out at number one? If you guessed public speaking, you are absolutely right. It would seem that most of us would prefer to get divorced rather than speak in public!

## Overcoming nervousness



So if you feel anxious and nervous before making a speech or presentation, you are certainly not alone. In fact, a few nerves can enhance your performance. That adrenaline coursing through the blood will help you marshal your energy and focus your thoughts – it's part of the fight or flight syndrome, and this is the fight. However, if you are just too nervous, it can be very debilitating and will diminish your performance. Here are some tips to help you overcome nervousness:

- Rehearse your presentation. Get comfortable with your material and the points you will cover. If you are involved in a team presentation, rehearsing is even more important.
- Know your subject area. Avoid at all costs, having to present someone else's material.
- Arrive early and get comfortable with the environment. You don't want to be rushed before you start
- Practice a few relaxing exercises; stretching, deep breathing, etc. before you start.
- Pause before you speak and establish firm eye contact with your audience
- Don't think of your audience as hostile or alien. They have invited you to speak and have an interest in what you might tell them. Remember you are the expert and you have something valuable to impart.
- There is usually a 'smiler' and a 'nodder' in most audiences. Focusing on this individual for the first few seconds can often help quell nerves and get you off to a good start.
- Finally, and perhaps this is a controversial piece of advice, but what's the worst that could happen to you? If you make a mistake, or even make a fool of yourself, will that lead to your dismissal or your ultimate demise? Probably not! Relax and do the best you can.

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### Discussion question

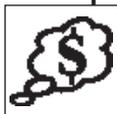
*How will you overcome nervousness before a presentation? How will you help other less experienced members of your team do the same?*

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### Thought for your ideas bank

If you do fluff your lines, lose your train of thought or totally dry up, remember that it's not the end of the world. Apologize, recover your composure, dust yourself down, and carry on. You are only human and you are certainly not the first person to experience such an embarrassment. In fact most of the greatest orators and actors in history have suffered stage fright or forgotten their lines. It's the ability to recover, as well as the human touch, that make truly great presenters.



You are the best judge of this and all of us have our own styles. I would just say that generally you should dress up rather than down and always dress to suit the occasion. Avoid flashy jewelry or anything in your personal dress that would detract from your presentation. A word of advice for women: more flesh = less status. Hose and good make-up spell professionalism, but again, don't overdo the cosmetics!

### What to wear



Check your shoes for scuffmarks and your clothing for stains, particularly on ties, blouses, shirts and jackets.

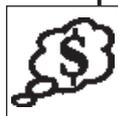
## Ask for the business



We will talk about closing the business in the next chapter, however you must remember to ask for the business before you leave your presentation. In most cases, you will probably not see a signed contract slide across the meeting table until somewhat later, but you must show your enthusiasm for the business and this means asking for it. You should ask when a final decision will be made, or at least the decision timetable, and make a note of this in your diary for follow-up purposes.

Here are some ways to ask for the business:

- We hope we have satisfied your needs in our proposal and that you feel confident to give us your business. May we review the contract with you?
- We are keen to start working with you, when do you think you will be making your decision?
- We are very willing to work on your schedule. We would like to be as helpful as possible as you move through the decision-making process.
- What do you think the next steps should be in order to get up and running with the work?
- Is there anything further we need to do in order to win your business?



### Thought for your ideas bank

A great way to ask for the business, particularly for those of us who prefer the indirect approach, is to give your buyers reasons to choose you. I like to close my presentation with a final slide entitled 'WHY US?' On this slide I outline four to five good reasons why my firm should be the provider of choice. You may remember that we covered this point in Chapter 8 - Writing Winning Proposals. It is an excellent way to close your presentation and is your opportunity to be a little boastful about your company and its value. It is not, however, a license to denigrate your competition!

For more useful tips on presenting, do read Chapter 12 - From The Customer's Viewpoint.

## **Summary**

This chapter covered the key techniques for presenting your proposal effectively, including thorough preparation, the importance of rehearsing and the four C's of presenting: Clarity, Control, Consistency and Confidence. Turn to the next chapter to review the next stage on the new business journey - closing the business.

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# chapter ten



## **Closing the business**

Introduction

Closing strategies

Ask for the business

Win/lose analysis

Negotiating the contract

Summary

## Introduction

*'There's a breathless hush in the Close tonight ten to make and the match to win'*

SIR HENRY NEWBOLT

In this chapter we will cover:

- Closing strategies to get your buyers to a decision.
- Learning lessons from your new business losses as well as your wins.
- Negotiating tips.

In most new business situations, it is unlikely that you will get a decision from your prospect immediately following your presentation or proposal submission. There is usually a close period which may last several days, or several weeks. This can be a frustrating time, especially if the buyers are a little tardy in making up their minds. In any event, I would recommend you write a letter following the presentation or submission of the proposal, thanking the prospect for the opportunity to bid and re-emphasizing your interest in their business. There may have been questions or areas in the presentation which were not fully covered, or requests made by the prospect for later action. These should be addressed as soon as possible, and preferably within a day or two following your meeting.

## Closing strategies



Even if you can't close the sale, try to close on something in order to keep the sales process alive. Closing on something heightens commitment and increases the prospect's motivation to buy. This is known as an intermediate close and could include:

- Meeting again.
- Further review and discussion of your proposal.
- Participating in a demonstration or visit to your office.
- Using the product or service on a trial basis.
- Arranging a meeting with another decision-maker in your company or the prospect's.
- Providing further information.
- Prospect's visit to a reference site.

## Ask for the business



One of the first things any rookie sales person learns on their first day is 'don't leave until you ask for the business!' But for most of us the hardest part is making a smooth transition from the presentation to the close. Here are seven low-pressure phrases that can move the sale forward:<sup>17</sup>

- 1 I need your approval to proceed.
- 2 When do you want to have this up and running?
- 3 Tell me where we stand.
- 4 When would you like to start seeing these benefits?
- 5 If we've covered all the bases, will you authorize the order?
- 6 Do you have any concerns that I haven't addressed?
- 7 To confirm delivery date, all you need to do is agree this preliminary order.

You might also consider using a compelling date by which the decision should be made if certain objectives are to be met, or activities undertaken. This might be associated with budget or fiscal planning; it might be attached to an industry event, or to the availability of a key resource.

Another strategy to bring the prospect to yes, or at least to a decision is to involve your coach if you have one. The coach can sometimes uncover hidden agendas or concerns, or provide guidance on next steps.

In any event, you are entitled to receive a decision, in a timely fashion. Quite honestly, I would rather lose the business to a competitor in a fair playing field, rather than to be in a situation where the prospect fails to make a decision at all, or has been merely 'window shopping' all along.



### Discussion question

*If you are currently trying to close a piece of business which closing strategy might you apply?*

## Win/lose analysis

If you have followed the points in this book, it is increasingly likely that the decision you receive will be a resounding 'Yes'. At an appropriate time (and recovered from your celebrating), here are a couple of questions you should ask your buyers:

- 1 Why did you select our firm? Can you let us know what you liked in particular as this helps us build best practice in business development?
- 2 Can you tell us what you did not like about our proposal or presentation? Again, this is also valuable information from which we can learn.

Do refer to Chapter 12, for more guidelines on analyzing your wins.

However, we must also look at the down side of business development and that is unfortunately when you do not win the business. This is always disappointing, but again you can learn from failure. You must try to ascertain from the prospects why you have been unsuccessful. Try to get them to be as specific as possible. In my experience, such a question is difficult both for the bidder and the customer, so I recommend you wait for a few days to let the dust settle and then ask if you can set up a phone or a face-to-face meeting. You have probably invested a good deal of time and money developing the bid and you are therefore entitled to some honest feedback.

You will also need to provide this feedback to your team. It is natural that they will be disappointed, nobody enjoys rejection, and you may hear comments along the following lines, 'well that was a waste of time and effort', or 'I wish we hadn't bothered bidding for that contract'.

My view is that the proposal process is never wasted and you have surely gained a good deal of knowledge along the way. This could be applied to win business from another player in the customer's industry, and has probably made you much smarter about that business and industry sector. Use your failure to bring you closer to your next success.

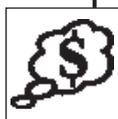


Part of the feedback process should include a thorough debrief with your team and your coach, as painful as this may be. Again, do use this as a significant learning experience. You should look critically at the following:

- How you worked through every step of the sales cycle.
- Whether you addressed all of the prospect's concerns.
- Whether your proposal was innovative and really met the customer's needs.
- Whether you sold on benefits, rather than features.
- How you and your team performed at the presentation.
- Whether you followed up in a timely and professional manner.

These are all internal considerations. However, you should also look at external factors relating to the customer's willingness to buy from you, or indeed from anyone. Perhaps in hindsight you recognize that they were indeed just 'window-shopping' and were not earnest buyers. Perhaps there were hidden agendas that you just did not uncover. Maybe you simply did not adequately qualify the business. Ask yourself the following questions:

- What can you learn from this experience?
- How will you avoid a similar occurrence in the future?
- How will you share this learning with others in your team and in your organization?



#### **Thought for your ideas data bank**

Here is another consideration based on a good deal of personal experience. Sometimes the incumbent supplier will be unable to satisfy the terms of the contract and you may have a chance to revisit the prospect later. **Never burn your bridges.** I always try to accept defeat gracefully, wishing the customer well in his endeavors, but always asking if we can stay in touch. I would say that almost a quarter of the new business I have won over the years was not won the first time around. I have simply stayed in touch with the company and bided my time.

**A****Exercise**

*Make a list of questions you would ask a buyer who has rejected your proposal. How would you share this feedback with your team and others in your company?*

*Do the same for a buyer who has given you a 'yes' decision.*

**Negotiating  
the contract**

There are many excellent books dealing with the skills required to negotiate effectively and for a list of some of them, as well as some advice on negotiation dos and don'ts, please refer to the final chapter of this book, written by guest contributor, Bryan Lee.

There are several models which have been used by writers on the subject of negotiating skills.

One model suggests that there are four key elements involved in negotiation:<sup>18</sup>

- The needs and objectives of the seller.
- The needs and objectives of the buyer.
- The ingredients of the negotiation.
- The point of balance.

It is suggested that negotiation takes place until a 'point of balance' is reached between the needs of the buyer and the needs of the seller, according to author Morse. The assumption behind the model is that you can assess the needs and stance of your opponent and work out the 'point of balance' to the advantages of both parties.



In closing this chapter, let me leave you with six key tips for reaching a 'win-win' outcome with your customer. These are extracted from the book, *Negotiating for Dummies*<sup>19</sup>, which I recommend as a must-read for anyone who wishes to enhance their negotiating skills. Consider:

- If the agreement furthers your personal long-range goals?
- If the agreement falls comfortably within the goals and limits you set for this particular negotiation?
- If you can perform your side of the agreement to the fullest?
- If you intend to meet your commitment?
- Based on all the information available, do you think the other side can perform the agreement to your expectations?
- Based on your knowledge, do you think the other side intends to carry out the terms of the agreement?

## Summary

This chapter essentially brings us to the end of our journey on the path to winning new business and I hope you have found it worthwhile. Do remember, though, that once you have won business you should always work on developing the customer relationship. Smart managers always consider that existing customers are prospects too.

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## **part four**

**Contributions and  
conclusions**

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# chapter eleven



## Tips from the trenches

Introduction

Three business development tips by Michael Bland

Innovative ways to uncover qualified leads  
by Roberta Moore

Not ready for primetime – the power of d-mail  
by Anne Ready

Perseverance pays off by Barbara Guerra

Winning in professional services is about trust  
by Alan Wein

Competitive pitches – making sure the ‘best team’ wins  
the business by Tony Burgess-Webb

## Introduction

### Three business development tips by Michael Bland

**Six highly experienced business developers share their advice and the selling techniques that have proved invaluable for them.**

*'Believe one who knows by experience'*

VIRGIL

To conclude this book I have invited several contributors to provide you with their own personal advice on sales and business development and I know you will enjoy reading what they have to say. Six people have each written a short essay with their personal tips and insights on various aspects of winning business, and you can read these in the following chapter. Finally, in Chapter 12, Bryan Lee of Cornwell Management Consultants plc, provides some excellent wisdom written from the customer's viewpoint.

**Michael Bland:** Author, consultant and trainer in corporate communications, crisis management, creativity and stress management.

I have survived as an independent consultant, trainer and lecturer for 18 years and have just recorded two successive record years. I'm sure some of this success has been down to luck - but then, as Gary Player said: 'It's funny: the harder I practice the luckier I get!' But apart from hard work, providing top quality service - and a little bit of luck - I think there are three things that help me most:

#### **Market, market, market**

Always keep marketing your services - no matter how busy you are - even if it's just one phone call or e-mail in a day. I learned this lesson the hard way when I started my business with two big - and very demanding - clients already in place and was devoting every last second to servicing them. Then I hit a quiet patch and discovered, too late, that you can't turn a tap and new business appears. Getting new business is like growing asparagus: you should always have started two years ago!



### **Remind 'em you're there**

Clients are like vacation romances. You can have the most passionate affair and swear undying love...then in no time at all you find they're in bed with someone else! Much of my work comes from a client being reminded of my existence just as he or she is thinking of using someone. I use newsletters, letters, wacky Christmas cards, phone calls, copies of press cuttings and things I've written, invitations to events etc, etc. My clients and prospects are never allowed to forget that I'm here and what I can offer. Recently I landed a job for one of the world's biggest companies after the relevant manager, whom I met at a workshop and who had ignored my letters, calls and e-mails for two years, received my newsletter just as he was looking for a speaker. But of course, don't oversolicit and become a pain in the butt - about once every one or two months is enough.

### **'Was there anything else, Sir?'**

A PR company recently asked if I taught Creativity as they were running an internal workshop on the subject. Suddenly I taught Creativity. The workshop was a big success so I offered a talk on the subject for my trade association. This event was a sell-out and I got three bookings and several indications of interest for further bookings - and am now offering the workshop to existing clients. It is easier, more pleasant and ten times more effective to offer new services to existing clients than to bash your brains in competing for new clients for your existing services.

## Innovative ways to uncover qualified leads by Roberta Moore

**Roberta Moore:** CEO and founder of Qualitative Marketing; founder of The Revenue Optimization Council. Author, columnist, and speaker.

### Case study – background

Our client was a business intelligence software company doing approximately \$100 million in revenue. Their goal was to reach CEOs and other senior executives in companies with revenues exceeding \$500 million.

Not only is this a tough group to reach, but also they had a new product in an area that was not well known. On top of this, without established customers, there was no documented record to illustrate how the product would benefit their potential customers. Needless to say, they had a very difficult time identifying qualified leads or getting the attention of their priority customers. It was taking up to a year to get ‘in the door’, even after they had purchased lists, offered seminars, exhibited at conferences, etc.

### Solution

We decided the best way to reach their goals and overcome the challenges they faced, was to create a new category and establish an association to serve this new category. In order to accomplish this, we decided to do the following groundwork:

- Identify point-of-entry to reach decision-makers.
- Understand their issues and the market factors influencing their decisions.
- Identify and develop relationships with key partners and organizations.

### Results

In less than nine months, we succeeded in establishing an association: The Revenue Optimization Council and creating a new category: Revenue Optimization.



We got the attention and support for this from:

- Accenture who created their Revenue Optimization practice.
- Columbia University who started the Revenue Process Optimization School of Excellence.
- Magnugistics who announced they were offering solutions relating to Enterprise Revenue Optimization.

A Google search recently revealed that more than 76% of the first 30 'hits' found were part of the Revenue Optimization Council or one of their customers.

One of the primary goals was to get qualified leads. This approach made it possible to identify fifty high-priority prospects in Fortune 500 companies and to get an entry into many of these companies.

### **Understand the buying process**

#### **Background**

When understanding the buying process, it is important to understand the assistance most people need to adopt anything new, whether it is technology or a new way of doing something. To adopt a new product or service, people go through distinct and identifiable steps. Whether it's a formal process or an informal one that people do on their own, a new product or service can't be fully utilized without addressing these steps. Yet, companies sometimes forget this important point.

Years ago, MIT published a study that showed only 10% to 15% of people will adopt something new, whether it's information or technology, without assistance. They found that the rest of us require assistance.

**Note:** The more assistance you provide your customers with the buying process, the more likely they will choose your product or service over your competitor. The more unknown and complex your product or service, the more crucial it is to provide the assistance necessary.





### Example

Technology provides a good example of the buying process because of its inherent complexity.

Technology companies often believe that adopting ‘their’ technology is easier and less involved than it really is. Most technology companies have ignored the crucial steps in the buying process and, instead lowered prices to encourage sales. Doing so has virtually eliminated the margins necessary to provide the services that address customers’ buying requirements.

Microsoft Corporation, for example, has done several things to address the buying process without having to become a specialized application development house. Two of the things they did to address the buying process before they were THE dominant force in the market were to:

- Develop templates for several of their larger customer segments and included the templates in the product. My company helped them identify the requirements for development of these templates. The templates helped to address the customers’ requirement for having the product tailored to their needs.
- Establish partnerships with companies that provided assistance throughout the entire buying process. These 30,000 plus Microsoft Solution Providers provide assistance with the selection, purchase, implementation and use of Microsoft’s products. We helped them identify possible partners and develop programs for those partners to provide such assistance.

### Conclusion

We have become a self-service oriented society: relying more on technology – such as the Internet and Integrated Voice Recognition systems – than on people to sell products and services. With an over reliance on technology and a lack of focus on trained personnel, this self-service notion is permeating many businesses from retail to communications and mortgages to medicine.

Companies that want to sell their goods and services will better serve their customers, and hence sell more products and create more customer loyalty, by fully understanding and addressing the buying process and training their people to effectively address it.

## **Not ready for primetime – the power of d-mail by Anne Ready**



**Anne Ready:** President & CEO, READY FOR MEDIA, California, USA.

In this brave new world of e-mail, an often overlooked or forgotten marketing tool is d-mail. It's what used to be called Direct Mail, sent via Snail Mail. With some distinct advantages over e-mail, d-mail has been the primary marketing tool for establishing our company, READY FOR MEDIA as one of the most established and well-respected media strategy and coaching firms in the US.

But before I share with you the advantages of d-mail, don't be thinking Junk or j-mail. Our campaigns are custom designed with our clients in mind. They go to a warm mailing list of close to 5,000 names and addresses of prospective, current and past clients, collected since computers came to work here.

D-mail is relatively inexpensive to send at 34 cents a stamp U.S., and provides a hard copy with our company name, address, phone number and web address which can live in future reference files for years. A good campaign brings to mind your company's services, which clients have experienced, are experiencing or have inquired about. If 'repeat' and 'referral' is the secret to growing a business, then you can keep your clients in the loop with a d-mail campaign!

### **Now that you know where to direct your mail, what should you send?**

About 10 years ago, our graphic designer, Steve Levine of Levine & Company (who also does such fun websites as [TheBlazeCompany.com](http://TheBlazeCompany.com)) convinced us that no one had time to read the newsletter we were painstakingly creating each quarter. They were full of stories and pictures about our clients and their successful media and personal appearances, new television talk show opportunities etc. It had seemed a good fit because we are in the media and personal appearance preparation business. But if no one was reading our newsletter because time is money, it was not efficient at all.

Instead, Mr. Levine suggested doing a little research each quarter to find a famous or rather infamous current events quote that exemplified what not to say in the media.

Today, some of our clients actually look forward to our 'Not Ready For Primetime' sound bites and share them with office mates. In short, our 'Media Mistakes Not To Make' campaign offers recipients a good laugh and a not so subtle reminder that the quote came from someone who was not yet READY FOR MEDIA.



For example, one quote was, 'Smoking kills. If you are killed, you lose a very important part of your life'. On the inside, we revealed that it was Harvard-educated actress and anti-smoking spokesperson Brooke Shields who was not quite ready for sound bite fame.

Another reminded clients that the following racist comment lost sports commentator Fuzzy Zoeller a 1/2 million dollar-a-year corporate contract when he said of Tiger Woods' win in the Masters, "That little boy is driving well and he's putting well. So... pat him on the back, say 'Congratulations and enjoy it.' And tell him not to serve fried chicken next year or collard greens or whatever the hell they serve."

And we chided Chicago Cubs Baseball Manager Jim Riggleman for his media quote: 'I try to have respect for people in general, whether it's baseball players or lowlifes like the media.'



The moral is design something for yourself or your client company that can be quick, easy and fun to absorb as a reminder to your past, current and prospective clients of their need for your services.

Anne Ready, President & CEO, READY FOR MEDIA, based in Malibu, California has been giving confidence in communication since 1981. Contact the firm at [www.READYFORMEDIA.com](http://www.READYFORMEDIA.com)

Steve Levine, President & Chief Creative Officer, LEVINE & COMPANY is a 31-year-old advertising and design firm specializing in brand development and creative strategy. Levine & Company's subsidiary, Digital Deviants, provides a full range of interactive and web services. <http://www.levineco.com> or <http://www.digitaldeviants.com>

## **Perseverance pays off by Barbara Guerra**

**Barbara Guerra:** CEO, Structural Research & Analysis Corporation, USA.

We all know the road toward a closed deal may have surprising obstacles, but some surprises may be just what the doctor ordered, so be prepared for them.

Structural Research & Analysis Corporation (SRAC) develops design analysis software that is a technology tool used to determine whether or not certain manufactured products will break, or at what point they will break. For our program to be of use to a customer, it must be used in conjunction with CAD software that is used to design a variety of products. To this end, one of our business goals was to join forces with a company that was a leading CAD developer, and become part of their top-level partner program. At the time I was Vice President of Sales for SRAC and had identified a potential partner. However, the particular CAD company I had targeted was already working with two companies in the analysis category, so the barrier to their having a third company seemed formidable.

The importance of being in the top-level partner program cannot be overstated. First, an endorsement from the CAD Company would ensure increased sales of our analysis program. Secondly, the CAD Company's policy was to engage in extra sales and marketing programs for companies in their top-level marketing program. I was not about to forego these potential benefits simply because I could predict an initial lack of enthusiasm from a few managers.

I flew out several times over the years to meet with several different people who were in charge of various aspects of the CAD program. I believe I convinced these people that we offered a unique product, and a unique business model that would help them reach their business goals. Later, I was also introduced to the manager of a new product category, which would work very well with our product. He, too, was persuaded that our company would add unique and substantial benefits to the product he was developing.

However, there appeared to be one insurmountable barrier to becoming part of their partnership program. The person at the top, the final decision maker, did not want us, plain and simple! I prepared myself to spend whatever time I could to convince that individual that SRAC would, in fact, be invaluable to the company.

However, before long, another problem arose. The key decision-maker at the top was promoted to another position and no one knew the identity of the person who was to succeed him. I was ready, willing, and able to be persuasive, but whom should I persuade?

I continued frequent contacts with my product manager contact who seemed willing to be our champion. Although he was unable to see me for six weeks, I waited. I knew it was important to be patient, tenacious and persistent.

When I arrived for my appointment with the product manager on the day that was designated for our long awaited meeting, I discovered that he had succeeded the key decision-maker and had now been appointed the top position in the company. Our ally and champion was now the man in charge of making the crucial decision. Joining the top level of their partner program was now a *fait accompli*.



The valuable lesson I learned from this experience is that every contact you make at every company is important. Whatever the contact's position in the organization's hierarchy, he or she may have an effect on your ultimate goal. Remember, too, that job titles and positions change frequently, and you can never have too many champions for your cause.

**Winning in  
professional  
services  
is about trust  
by Alan Wein**

**Alan Wein:** Managing Partner, Financial Services, Ernst & Young LLP (UK)

Having worked in a professional services environment for two decades I am still awaiting the time when I actually end up selling a client some pre-packaged service that my colleagues have put together. Of course there are common themes running through many of the services that we, and our competitors, provide, but each one requires careful tailoring and some (usually significant) degree of custom design. After all, if you want to charge couture level prices, being seen to deliver off-the-peg solutions is hardly going to support your brand and margin strategies.



### Building the relationship

So, if I never sell exactly what I set out to sell, how does anything ever get done? The answer is as always; clients who are sophisticated, multi-time purchasers, simply decide what they want to buy. My role in the sales process then is to build awareness of our capabilities, build trust in our commitment and capability to deliver and add value to the shaping of the solution. The final piece, which has to be addressed, is the acknowledgement that any purchase of relatively highly priced services, is bound to attract some kind of corporate attention and therefore create at a minimum a need to articulate the value or in some cases some degree of personal risk for the buyer. So the first rule in building the best and most durable of relationships, is to recognize the exposure the executive has and make sure you deliver the hell out of it, so your client can turn that risk into a broadly recognized positive outturn.

But while you're initially targeting the organization, beginning to win work, the situation is a different one. Well, aside from the usual things of knowing that the senior executive has a budget, is reasonably disposed to your firm and other basic targeting questions such as these, the key remains as always, an implicit but highly significant value exchange. Philosophically the thinking goes something like this. All senior executives are time pressured. Most will find some, albeit limited time to stay in touch with external advisers of one sort or another to get some external perspective; therefore, it is a competition as to which professional services firm (or individual within it) can deliver the best value to your target buyer. Because my thesis remains, if you get the relationship right and make the executive aware and trusting of your services, they will buy, and buy repeatedly.

### What value does the executive want?

It is clear what it is that we want from a relationship, but even then there are multiple layers of value aside from money, which the professional services firm can leverage from the relationship, including thinking insights and networking assistance. But from the client side, most want a number of things:



- **Agreeability** - Is the advisor fun to be with?
- **Value add** - What's going on in the marketplace? What are others doing/thinking? How do you see us versus them?

- **Gossip** – What is going on in my own organization? How does the land lay?
- **Cross-industry analogies** – Stories from other industries that are valuable to the executive in engaging and influencing arguments in the executive suite.

If you can consistently deliver this to your target audience, then with a fair wind you will probably win the battle for a share of the executive's mind.

### **Developing the model**

Ultimately when you know enough of the executives of one company, then a new phenomenon can occur. They may begin using you as part of their own informal communication, to contribute to the management glue or in taking the temperature of the organization. I always tried to communicate to our younger aspiring account leaders, that the ultimate test of their impact would be when they took me on a couple of visits to the main sites to see how far they could walk the corridor before they bumped into reasonably senior executives who would be pleased to see them and happy to pass the time of day. Once you are at that point, you can often become, on a limited scale, a kind of confidant/confessor/internal intermediary; and that can also deliver occasional real value to the client, as well as the obvious benefits of understanding the organization's agenda.



But as you get to know the personalities and agenda around the organization there is a degree of risk in stepping into the internal organizational politics. This is a 'no no' and therefore if you are straightforward and respectful of the buyer/supplier relationship, trust can be engendered, dialogue on a series of levels can ensue and the opportunity to become their trusted advisor and implementer, when you're needed, can follow.

## Competitive pitches – making sure the ‘best team’ wins the business by Tony Burgess-Webb

**Tony Burgess-Webb:** Executive Vice President, Hill and Knowlton

Competitive pitches are a necessary evil in the communications services business. It takes both parties, client and agency, to ensure that the best team genuinely wins the business.

Most clients and agencies view most pitches as acts of theatre; scripting, roles, rehearsals, playing to the audience – all have their part. Although it is often more ‘stand-up’ than Shakespeare, the same rules apply: performers rely on tricks of the trade and audiences want to be tricked.

Yet the teams that best represent what an agency really has to offer are seldom, as is often requested, made up purely of those who will actually service the account. While buyers are famously afraid of ‘bait and switch’, this should not preclude them from wanting to see more than just the account team. Great client service people are not always great presenters and vice versa. By contrast good account people are always good listeners but in a short pitch meeting leading to a comparative judgment, good listening skills are not what you need.

And if the project or program is of any size, complexity, geographic reach or longevity, it will be impossible to show everyone who will be involved. Most agencies are internal webs of inter-locking dependencies – how the account is actually serviced in six months time may depend more on agency management and culture than on the account director you met and liked at the pitch – but is now on a travel sabbatical.

Naïve buyers may believe that what they see is what they will get but this is often wrong – agencies can be as good at theatre as actors. And as George Burns (probably) said, ‘Acting is all about honesty. Once you can fake that, you’ve got it made.’

Most buyers could improve the quality of the agency selection process by being more rational, rigorous and transparent – and less emotional, personal and secretive.

Here are some suggestions, time permitting:

- **Always write a brief:** set out the objectives, the budget and the specific requirements and the selection criteria for the short-list including terms that will apply; decide what kind of agency/consultant you think you really need; get the buying dept involved (but do not let them dominate).



- **Research a 'long-list'** to provide credentials in writing or online; evaluate their responses fairly against your criteria.
- **Define your short-list agencies** and get them to show you their work and ask to meet a wide variety of people including management and any specialist depts.
- **Let them visit you** to meet their customers as well as the manager of the buying process.
- **Overall, spend time with them** proportionate to the importance of the success/failure of the assignment.
- **If you need a pitch, pay for any creative work**; this gives you the copyright; ask to see the key account personnel in addition to anyone else the agency wants to bring.
- **Make sure that all pitches take place on the same day** if possible; make sure the same buying group sees all the pitches.
- **Evaluate** based on your experience of the agency overall as well as their actual pitch.

All the above will help improve the quality of the selection procedure but it is only one half of the equation - a professional approach by agencies is essential too. Typically agencies are comprised mainly of enthusiasts. They often do not qualify leads or prospective clients well enough (especially when times are tough) and will run after any new business like kids after a football.



**Assuming that the agency has qualified and that they genuinely think they can do the work required, how can they best ensure they get their half of the win-win?**

Most important is team selection: agencies must use the best team. This obvious point is often lost in the pitch process. Because agency culture usually makes heroes of the 'rainmakers', the ones who present best and therefore seem to bring in new business, the focus is all on presentation skills. But winning pitches are actually made up of three, interlocking 'best teams' - and all are essential.

First, there is the team that will manage the pitch process, do the analysis, create the ideas and produce the presentation and any collateral. Most of this team will never make it to the actual pitch but without them,

no agency deserves to win. Recognition for these people within the agency is never as high as it should be, yet their role is essential and may be relevant to expose to the more discerning buyer.

Second, the presentation team: pitch teams should reflect the agency through a mix of management, creative and account people. This team needs to have agreed roles and speak their lines well enough to tell the true agency story. They also need a clear leader and an agreed way to handle questions. Above all, they need to rehearse together so they look and sound like a team.

Third, and absolutely not least, there is the team that all buyers say they want to see - the ones that will do the actual work. They don't all have to be at the pitch but if the key people cannot be there on the day, buyers might reasonably wonder when they ever will be.

It is a combination of all three of the above that makes up an agency's 'best team' and best represents what an agency really has to offer. It is up to agencies to put them forward and up to clients to demand they do.

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# chapter twelve



## **From the customer's viewpoint**

**By Bryan Lee, Principal Consultant,  
Cornwell Management Consultants, plc**

Introduction

Cold calls and visits

Presentations

Negotiations

Losing gracefully

Winning gracefully

Conclusion

Further reading

**Last word from the author**

References

*Cornwell Management Consultants is a leading UK Management & IT Consultancy (see website [www.cornwell.co.uk](http://www.cornwell.co.uk) for more details).*

## Introduction

*'O wad some Power the giftie gie us  
To see oursels as others see us!'*

ROBERT BURNS

During 2000 and 2001, my firm advised a major UK Government Department on procurement. More specifically, I was the project manager, during the procurement stage, of an IT services and application development project that culminated in the award of a 10-year contract valued in excess of £200 million.

This experience, which initially involved dealing with 64 interested companies, gave me an insight into the customer's viewpoint that the author of this book felt might be worth sharing with you.

What follows is a description of the procurement process punctuated by observations on the behavior of the competing parties and my views on successful and unsuccessful techniques for winning business.

Early in 2000, my focus was on developing a robust initial outline business case. Later in the year my attention switched to working up an appropriate Project Initiation Document (we were using the PRINCE2 project management methodology). During this early stage, I received a number of 'cold' calls and, as a result, occasionally accepted visits. I also received unsolicited mail which, invariably, I filed carefully... in the rubbish bin!

## Cold calls and visits



The key question here was - what aspects of a cold call persuaded me to accept a visit?

The answer was invariably: Proposing a **short** meeting to find out more about what I was doing **and** offering to help (rather than giving me a sales pitch).

Of the visits I accepted, only four stand out in my memory because the company representatives concerned not only spent most of the time listening but also followed up the meeting by writing a reason-

ably short (up to three pages) note summarizing their view of the problems that I faced and offering pragmatic advice (effectively some loss leading free consultancy).

By October 2000, we were ready to formally initiate the Private Finance Initiative (PFI) procurement by placing an advertisement in the Official Journal of the European Community (we were following the EC Negotiated Procedure). 64 companies responded by providing Expressions of Interest and 40 attended our open briefing meeting in late November of that year. Early in 2001, 14 companies submitted Mini (initial) Proposals and following an evaluation of these proposals, eight companies were invited to interview.

### Initial proposals

Six of the 14 Mini Proposals failed this early filter, why? The main reasons were:

- The company did not possess the capabilities required. (*Conclusion: They were incompetent or mistakenly believed that submitting a non-conformant proposal would raise their profile*);
- The company did not answer the questions posed. (*Conclusion: They were very incompetent*);
- The proposal was longer than the (clearly stipulated) 15-page limit (*Conclusion: They were extremely incompetent*).

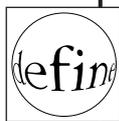


On a more serious note, the key aspect here was to have empathy with the customer. The customer's evaluation team had to read and analyze all of the proposals. A rigorous audit trail had to be generated which involved following a detailed evaluation process and model. They were under pressure to meet tight timescales. Consequently, the ideal proposal should have been structured to enable the evaluation team to quickly pick out the key answers from amongst the inevitable 'boiler-plating' (those standard elements that are always included).

The original questions should have been repeated in the response (using the same numbering format if possible). The questions and answers should have been highlighted in some way, e.g. bold italics or colored lettering.

Of the eight companies interviewed during the Mini Proposal stage, seven were invited to submit Full Proposals (more on interviews/presentations later). One of the seven decided not to bid (balancing the high cost of generating a Full Proposal against the chance of being short-listed) and two of the remaining six decided to join forces. Consequently, we were presented with five Full Proposals to evaluate.

### Full proposals



The Full Proposals were written in response to a 95 page Statement of Service Requirement that listed Mandatory, Desirable and Information Requirements. The definition of these different types of requirement was as follows:

There are three types of requirement identified:

- 1 **M** means a mandatory service requirement. Eventually, bidders must be able and willing to meet all of the (Government Department's) mandatory requirements in order to be considered as a potential Contractor but at this stage in the procurement the (Government Department) is willing to consider alternative proposals;
- 2 **D** means a desirable service requirement. The Government Department hopes that bidders will be able and willing to satisfy most, if not all, desirable requirements;
- 3 **I** means a request for information. A bidder's response to the Invitation to Submit a Full Proposal (ISFP) must include a response to each of these requirements.



Inevitably, these proposals were lengthy (several hundred pages) and complex. The highest scoring proposal exhibited the following characteristics:

- An eloquent Management Summary;
- A table providing clear cross-references to identify that responses had been provided to all of the Mandatory, Desirable and Information Requirements;
- A clear index;
- Extensive use of diagrams and color to break up text;

## Presentations



- Added value – not only were all of the requirements met but also additional ideas/concepts were proposed;
- Plain English – the use of jargon was minimal;
- Cross references within the document worked;
- There were no typographical errors – an indication that the document had been subjected to independent quality assurance;
- Detailed information was placed into Annexes;
- Relevant experience was illustrated by specific examples rather than by general statements.

As part of the Full Proposal evaluation process, all five companies/consortia were invited to participate in half-day presentation/interview sessions.

By this stage in the procurement process, we had grown used to listening to presentations of one sort or another ranging from one-on-one meetings in the early days to presentation teams of up to ten speakers addressing large audiences. Even at the Full Proposal stage, the difference in presentation performance was surprising. The five parties concerned were all major names in the market place and yet their presentation ability ranged from very poor to what should have been the norm, i.e. excellent. The easiest way of summarizing this experience is to give you my view of dos and don'ts stemming from those presentations:

### Do

- Rehearse – listen to each other, don't just focus on your own section. Rehearse in front of a critical audience to inject an appropriate level of stress so that you can discover any distracting habits or mannerisms. (*One nervous presenter used the word 'actually' 20 times in three minutes – we know, because we all started counting!*);
- Practice hand-overs between speakers. (*A number of speakers were so relieved to finish their section that they forgot to introduce the next speaker*);

- Subject slide content to independent review – typographical errors become glaringly obvious when projected onto a large screen. (*Spelling errors were surprisingly common – a comment on the IT industry?*);
- Focus on passing on a few key messages. (*Nearly all of the presentations used too many slides and the slides contained too much information*);
- Check the presentation room before the big day. (*Particularly important if the venue is already equipped with audio visual equipment – inadvertently operating the window blinds instead of selecting the next slide can be distracting!*);
- Take care when being met and escorted by junior members of staff they may not be junior and they will report their findings to the evaluators. (*At one stage, I acted as an escort and was able to later report that the visiting presentation team had introduced themselves to each other in the lift! One of our presentation evaluation criteria had been 'teamwork'! Unsurprisingly, their presentation was dire*);
- Set the room up to your requirements. (*The biggest mistake here was not to check the audience's lines of sight and, therefore, placing the presenter in a position which blocked the screen – to be thorough get members of your team to sit in the audience's seats*);
- Have a backup in case of technology failure. (*The bound copies of your slides, which you were going to leave with your audience, can be used in an emergency*);
- 'Buddy' check each other's appearance. (*We saw instances of ruffled hair; loose ties etc.*);
- Maintain eye contact with the audience. (*A number of speakers presented their back to the audience and mumbled at the screen. Nevertheless, always take a quick look to make sure that the appropriate slide is on display*);
- Speak clearly and slowly; remember the content of your presentation is new to your audience. (*Rushed delivery was a common problem, usually caused by nerves but also caused by using too many slides with too much detail*);
- Distribute handouts **after** speaking, unless, of course, the audio-visual equipment fails! (*Otherwise, as one of our bidders found, the*

*rustling of paper will drown your speech out and nobody will be listening to you);*

- Accept that the designers of Microsoft PowerPoint know their business, i.e. whenever possible use the large default font size and, as a consequence, produce uncluttered slides with clear messages;
- Finish with an upbeat summary. *(Particularly, if the presentation has been complex, always try to finish on a high note and impart no more than three key messages);*
- Present a united front – particularly during questions. *(One presentation descended into confusion when the presentation team members disagreed on the answer to a question);*
- Be comfortable with silence before answering. *(Even if you know an answer, a short pause before replying conveys the impression that you are giving the questioner the attention she/he deserves);*
- Be honest – admit your limitations. *(We were very suspicious of any supplier that claimed expertise in all areas of our requirement – admitting limitations gave an impression of sincerity and integrity. We did, however, expect to hear a solution to the limitation, e.g. sub-contracting).*

### **Don't**

- Start by apologizing (for whatever reason). *(A presentation is your opportunity to take control of the situation – apologizing had the reverse effect);*
- Give the impression that you know better than the customer. *(Amazingly, this really happened – an arrogant consultancy had not considered the possibility that a Government Department would hire in its own experts! Nevertheless, it is clear that the customer is not always right – under these circumstances, tact and diplomacy should be employed to steer the client to your point of view);*
- Waffle – if you don't know the answer, admit to it and offer to provide a follow-up response after you have had a chance to research the issue. *(Remember that the evaluation team has to listen to a number of similar presentations which is a boring enough experience without any waffle!);*

- Use a large number of slides – a good rule of thumb is a slide per minute, provided the slide content is simple. (*One five person team managed to get through 45 detailed slides in 25 minutes and didn't provide a summary – we were none the wiser at the end*);
- Read out the words on the slide – allow the audience time to read the (simple) content, and then augment the slide with your additional oral comments. (*This approach has the bonus of forcing the audience to participate – essential if you are presenting directly after lunch!*);
- Overlap the content of your section with any other team members. (*This won't be a problem if you rehearse*);
- Underestimate the audience – experts may have been hired in. (*Nevertheless, limit the number of your main points and keep them simple – you want your message to be remembered – always use a summary*);
- Relax until you are out of the building and out of earshot. (*Escorts and reception staff have ears!*).

The presentations concluded the companies' inputs to the Full Proposal stage. After the five bids had been fully assessed, two bidders were short listed in mid-2001. In accordance with the EC Negotiated Procedure, full negotiations were undertaken with each bidder and two draft contracts were drawn up by October of that year.

## Negotiations

Many books have already been written to address negotiation techniques and it is not my intention to re-visit that old ground. Nevertheless, it is worth briefly describing my perception of the customer's viewpoint. Most of my team were new to negotiating a deal of such a large size and complexity. However, I was fortunate in that I had been able to augment the team with two highly experienced procurement consultants (also from Cornwell) who had already completed a number of major negotiations.

What became clear very rapidly was that negotiation was, for the most part, a tedious and time-consuming activity. Given that we had scheduled some five months for this stage of the project, it was essential that we (and the short-listed bidders) made the experience as pleasant as possible.



On reflection, the negotiations were satisfactory; we stayed on schedule and managed to agree two acceptable contracts. In general terms, the bidders performed well and, (rather like my advice on presentations,) I was left with a firm view of the dos and don'ts applicable to negotiations:

**Do**

- Provide logical reasons for adopting a negotiating stance;
- Allow the customer some room to manoeuvre thus allowing compromises to be reached (and faces to be saved!);
- Keep your lawyers in the background to the maximum extent possible (this practice fitted with our view that the contract should be negotiated by business owners as far as possible);
- Offer help in peripheral areas not relating to the contract.

**Don't**

- Unnecessarily vary the composition of your negotiating team (you will lose the rapport you have established with the Customer's team; you may also run the risk of not providing a united front on a key negotiating issue);
- Confuse being unfriendly with being firm (if you are friendly, five months does not seem that long! But you can still drive a hard bargain if you stay firm).

At the end of the negotiations, we asked each bidder to cost their proposals (the agreed draft contract) by inviting 'Best and Final Offers' (BAFOs). Analysis of the two contracts and their associated BAFOs led to the selection of a Preferred Bidder and a Reserve Bidder at the end of November 2001. During December, the contract with the Preferred Bidder was finalized and eventually signed (on schedule) on 31 December 2001.

## Losing gracefully



In January 2002, the losing bidder was briefed on its performance. Previously, we had also provided 'losing' debriefings to the three bidders who had provided Full Proposals but had not been short-listed. Inevitably, my experience of conducting these debriefs yielded a few observations on how a supplier should behave during such meetings.

The key point to remember is that the customer is providing the debrief for the bidder's benefit. My view of dos and don'ts are:

### Do

- Accept that the selection decision is final and will not be changed;
- Understand that the customer is trying to be helpful;
- Maintain dignity and professionalism;
- Approach the debrief in a constructive manner;
- Bring an 'independent' member of your organization along (somebody who has not been involved in bidding) – they will add a measure of calm and dispassion to the proceedings;
- Learn from mistakes and build modified approaches into subsequent business dealings.

### Don't

- Try to change the selection decision;
- Become offensive;
- Expect to be given details of your competitors' bids.

## Winning gracefully



Clearly, although 'winning' is the culmination of your marketing and sales activities it is also the start of service/product delivery. It is a crucial point at which your relationship with the customer can be shaped. Consequently, here are a few more of my ideas for dos and don'ts:

### Do

- Ask for a debrief to gain a better understanding of where you stand at the outset of your relationship and to give you the opportunity to provide your views to your new customer;
- Arrange team building events as soon as possible to maintain the momentum of a good start to the relationship;
- If possible, co-locate some of your staff with your new customer to foster a 'partnership' style of working;
- Flood your new clients premises with your corporate logo; coffee mugs are a cheap and effective medium - the underlying message is that you are 'here to stay';
- Maintain good working relationships with the competitors you have just beaten, as you never know when an opportunity for collaborative working may arise in the future.

### Don't

- Expect to be given details of your competitors' bids;
- Start referring to the contract. Immediately referring to the contract at the start of a new relationship sends the wrong messages - the contract should be regarded as a 'fall-back' in the event that normal discussions fail.

## Conclusion

Project managing a major procurement for two years has given me, as an external consultant, a unique perspective of what it is like to sit on the 'opposite side of the desk'.

My hope is that you will find that some of my observations are useful when you attempt to win new business. Good luck!

## Further reading

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- 2 *The Seven Habits of Highly Effective People* • **Stephen Covey**. Publisher: Simon & Schuster, ISBN: 0684858398 (*particularly Habits 4,5 & 6*)
- 3 *Conflicts* • **Edward De Bono**. Penguin Books (1985) ISBN: 0 14 02.2684 2
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- 11 *Negotiation: Skills and Strategies* • **Alan Fowler**. Institute of Personnel Management (1990) ISBN: 0 85292 416
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## Last word from the author



### The authors top ten tips for winning business

- 1 Know your unique value propositions and how these can be used to your competitive advantage.
- 2 Understand what your prospective customer sees as a benefit and associate your product/service features with these.
- 3 Identify the decision-maker/s early in the sales cycle and do your best to develop a relationship with them.
- 4 Build market profile through PR and other marketing communications - selling is much easier if people have heard of you and are predisposed towards you.
- 5 Know when to walk away from a new business opportunity, however painful it may be.
- 6 Understand your prospect's buying process and how you fit into it.
- 7 Do your best to win the hearts and minds of your prospects before the final sales presentation.
- 8 Make sure you write your proposal or tender document from the viewpoint of the prospective client or customer.
- 9 Rehearse your presentation to ensure a smooth and professional delivery.
- 10 Ask for the business!

*Susan Croft*

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- 4 How to Drive your Competition Crazy by Guy Kawasaki, Hyperion, 1995.
- 5 How Competitive Forces Shape Strategy by Michael E Porter writing in Harvard Business Review, July - August 1997.
- 6 Relationship Marketing: Successful Strategies for the Age of the Customer by Regis McKenna, Perseus Books, 1991.
- 7 203 Ways to be Supremely Successful in the New World of Selling by John R Graham, Macmillan Spectrum, 1996.
- 8 The Tipping Point by Malcolm Gladwell, Little, Brown & Co., 2000.
- 9 Adapted from Close the Deal by Sam Deep and Lyle Sussman, Perseus Books.
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- 11 How to Win Friends and Influence People by Dale Carnegie, Hutchinson, 1994.
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- 16 Managing the Professional Service Firm by David Maister, The Free Press, 1993.

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