Six Rules for Herding Cats

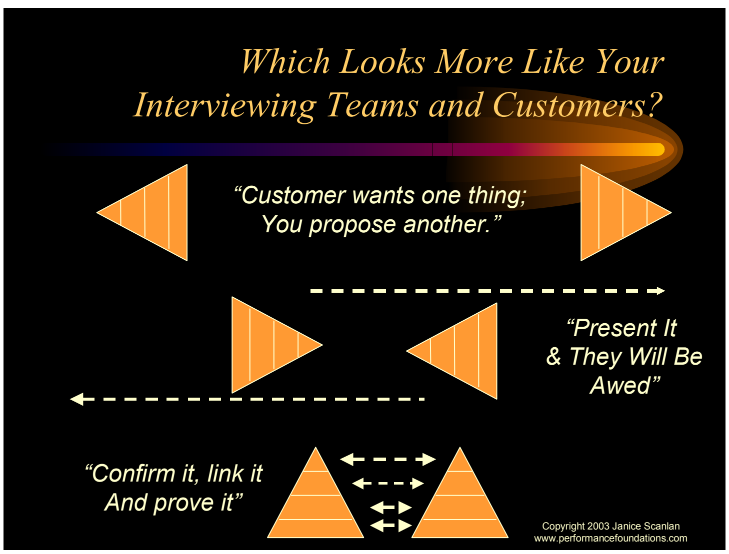
Coaching Proposal Interview Teams

by Janice Scanlan CMC

Buyers are changing the way they buy and do business. The higher the dollar and risk, the greater likelihood the buyer will be more demanding on the interviewing agenda. Add complexity of projects and the inability of one individual to field all questions –and you need an interviewing team.

Given this situation, buyers are more likely to bring a larger interview team with the requirement to talk with "people doing the job."

These can be small or large. However, the larger and more important the project, the trend is to more breakouts, peer-level conferences and more opportunities to eliminate your firm from the running if your entire team isn't prepared.



Which graphic pair looks more like your team's approach?

The challenge is creating a consistent and clear message that ***confirms*** what the client wants, ***links*** your solution to those needs and ***proves*** you are capable of performing. It also requires the ***agility*** to change when the buyer has changed and not be caught flat-footed or locked into a complex presentation that no longer fits the client's priorities.

Most people have played the game "gossip" where one message is whispered from one party to another. Even with a simple one or two sentence "message" it's easy for it to be vastly changed and often unrecognizable at the end of the chain.

Just think of the possibilities for miscommunication when you have a complex project that requires multiple specialty skills, expertise and numerous people to execute.

Take a moment to think about how your organization approaches a complex team sale with multiple levels of participants.

Does your organization:

- Ignore client needs and present what you think is best?
- Make a presentation that "dazzles?"
- Or do you have a conversation that *confirms, links and proves* your solution?

In working with highly complex sales and large interview teams, all three of the variations often occur at various times during the preparation phase.

Such is the nature of dealing with people. The challenge is anticipating and managing these normal human behaviors during the preparation phase so that the approaches have been "heard, seen and understood by your entire team from the customer's viewpoint."

Unless individuals understand the consequences of such actions in terms of impact to the customer, successfully improving customer-oriented behaviors is improbable.

Case Study:
Challenges Facing One Interview Team

The challenges facing this team included:

- Team was eliminated and not on the list of five finalists—this added a sixth meeting for the buying team.
- Six working days to prepare (including Saturday) during the Easter weekend.
- Due to mergers and acquisitions the team was comprised of four separate corporate cultures of around 75 people that globally represent 14 international cultures and every continent but Australia.
- The team's client strategy was not firm.
- The Executive Summary from the proposal was not usable.
- Two joint-venture partner agreements were not settled.
- The buyer was vacillating between priorities.
- The buyer was mandating an agenda that will arrive "tomorrow." It arrived Tuesday afternoon prior to the Thursday 8 AM meeting. The agenda required fourteen breakout sessions and allowed 20 minutes for presentation.
- Many people on our team had not been involved in developing the proposal.
- The normal difficulties of interviewing teams including differing perspectives, varying people and client skills, other pressing work and many people feeling the odds make this a complete waste of time.
- The buyer had originally disqualified our team for arrogance, not fielding or answering questions well and concern that they will not be able to maintain alignment with our team.
- The "team facilitator" had never heard of the product or seen the proposal.

This team made the short list in spite of an uphill battle and short time frame!

How to Bring the Customer into the Process to Win . . .

Getting any group on the same page quickly is a challenge. Engaging the buyer to be part of the team is even more difficult.

While speaking at an APMP meeting, the table topic was worst interviewing team situation—often the stories were related to small gaffs that had enormous impact on the client. Others related to choosing the wrong people to present, while others regarded making unwarranted claims in the meeting.

All of these difficulties reflect one common thread: *lack of customer-focus*.

By failing to focus on the client's needs, it becomes very easy to turn the meeting into a sales presentation, not a conversation with the client. It then becomes common to ask individuals to perform in roles for which they are not suited, not confident and uncomfortable.

Discomfort often produces gaffs and blunders that magnify the lack of client focus—and lose contracts!

Projecting competence comes from confidence in what you do. However, there is a fine line between confidence and arrogance. The client wants to meet members of the team when execution, working together and staying aligned during the project are important. They want to know they can work with you—top to bottom. They want you to be able to listen to their concerns and work with you to address them.

Buyers are not looking for salespeople and presenters—they want collaborators who will work with them and listen when difficulties arise during the project.

If you are too slick, insincere, unable or unwilling to listen, this leaves an impression with the client that you will not work with them when the going gets tough. Is that the impression you want?

The slick and awe-inspiring presentation was common during the mid to late 90's. It almost seems to have become embedded in our thinking of how to prepare an interview team and presentation versus the conversation with the client. Instead of focusing on the customer's wants and needs, we almost jump into a presentation without thinking client.

How often does your organization get hung up in the technology of what we're going to do versus looking at how our solution helps the client get to where they want to go? Instead of starting with the power drivers of any endeavor (customer focus, leadership, strategy, process, communication and a rewarding working environment), we launch into how we're going to dazzle the client and focus on support drivers (technology of producing the message and "training" presenters), not the power drivers for dealing with people performance.

Test: Early On, How Much Time do You Devote to What the Client Wants and How You Satisfy Those Needs?

Unfortunately, the answer is often very little.

The need to "make a presentation" is so strong that it is almost impossible to stop the train. This need to create a presentation can be channeled. The key is keeping it geared to what the customers wants, how we fulfill it, and proving we can do it—then focusing the message to each part of the project.

Use the need to get something on paper to focus your message—you may not even use these "talking points"—they are a *means, not an end.*

Six Rules for Herding Cats:

How they applied to our case interview team.

1. Keep the buyer's objectives in front of you at all times. When you only have 6 days to prepare, no agenda and 75 individuals to coordinate, it's easy to loose track of what you're doing in the chaos. However, having too much time can cause you to invest more time and effort than is necessary and overlook the buyer's needs in the process as well. In this particular case we also had the disadvantage of an unusable executive summary. Indeed, it was a challenge to say on track even with buyer's needs firmly in front of us at all times! By keeping the client's objectives in view, we didn't waste as much time going off on tangents. Even then, tangents happen.

2. Get everyone on the same page. Our buyer's priorities were fluctuating, and our executive summary was unusable. Executive and project management had to produce a consistent approach and message plus factor in fluctuating needs. Achieving our message and developing two optional approaches to the project that covered the bases, whichever course the buyer chose, consumed almost four of our six days. We had to find a ready way to work parallel to get the team of 60+ other people prepared. To achieve this we developed 21 questions from the buyer's standpoint for the engineers and other technical support people to answer from their specialty.

Because we were merging four groups who had not worked together, we also reviewed all major common systems so that we were speaking the same language and were consistent on what systems would be used.

3. Engage the team with questions from the buyer's viewpoint. Technical and engineering people, in general, are uncomfortable with issues not fully spelled out. One of their strengths is seeing all the parts and putting them together. However, this can make working with proposals (and particularly proposals selling on capability) very uncomfortable. What's appropriate to share with the client? Providing the team with the phrase, *"We don't know. How we've done that in the past. . . ."* is a helpful phrase to lessen some of the stress of responding to hypothetical situations. Reminding the team this is not an execution plan is also helpful--it's ok not to know.

To prepare the team we used a senior project manager who spoke engineering's language. He worked with the team to go through the questions and ***listen to and answer their concerns*** so they were comfortable with their part and their answers. When the client agenda arrived one and one-half days before the meeting and required 14 breakout and technical sessions, the team was already prepared.

4. Use strengths of your proposal and your team. One of the greatest fears is fear of public speaking. Don't try to turn non-speakers into speakers. Use individuals comfortable with speaking and support their style of presentation. Ensure that speakers know when to defer to others and when to research a question. By preparing the team from the customer's viewpoint, we capitalized on their knowledge and placed them in roles that were compatible with their strengths.

Likewise, there will always be "weaknesses" of the team and proposal. Don't try to hide them—it creates more suspicion and distrust. One of our teams' weaknesses was using a different 3-D CADD system. The head of the CADD team researched the differences and had **Plan B** for transition. He knew exactly what would be the more difficult transitions and acknowledged them. One of the "agenda items" was a building tour. We ensured that we took the buyer's team to the CADD area. By seeing intelligent, well-trained and capable people, this "weakness" we could have obsessed over, became a non-issue because we were prepared, didn't try to "hide or minimize the difference" and showed confidence in our people's ability to learn and adapt.

5. Expect change and stay responsive. Almost every hour during these six days presented new changes and challenges. At 6 PM the evening before the 8AM presentation, one of the joint venture partners started taking exception with parts of the presentation. Many of the "issues" had nothing to do with the presentation, and the ones that did were minor. By separating the issues, this dispute was calmly handled within 30 minutes and

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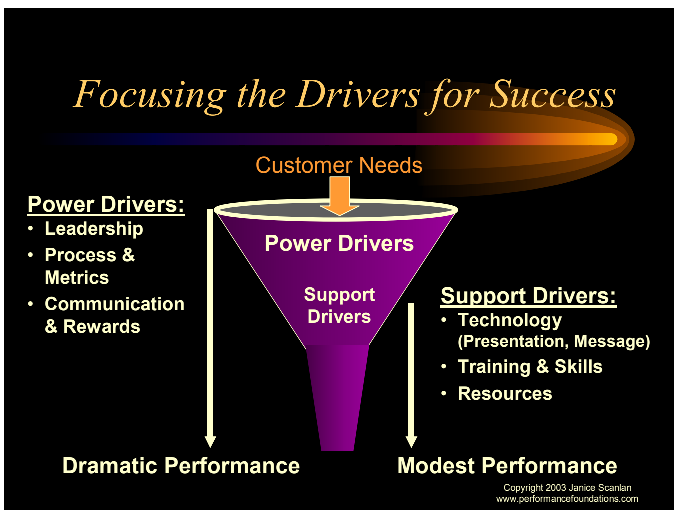
6. Maintain an upbeat and relaxed environment.

appropriate people and channels for other issues identified. Questions like, *"Does this make any difference to the presentation?"* helped re-focus on immediate issues and did not cause an interruption or conflict to upset our focus on the customer. Many issues are "so what," but remember they are important to the individual raising them. Staying calm, firm on purpose and focused are key. Listen and respond.

6. Maintain a upbeat and relaxed environment—both before and during the meeting. It doesn't take much imagination to anticipate that many members of our team thought this exercise was a waste of time. By acknowledging people's time and effort and appreciating their help, the team became purpose focused. The key is listening and using what's right about each individual. The project manager who "coached" the engineers had some of the strongest reservations about this effort. He had other work and this was a real distraction. By making it as easy as possible for him to participate, minimizing meetings and getting simultaneous efforts going, an upbeat and cooperative spirit was maintained.



Conversely, the buying team was making an extra trip, meeting, and report as well. The crossed arms and negative attitude was evident at the beginning of the meeting. It's hard to "stay unhappy" if something is amusing. We ended our short presentation we a small bit of graphic humor that was appropriate to the presentation. The group laughed and the tension reduced considerably.

By having a prepared and organized team, we were able to maintain a conversational tone throughout the day. By using what people know and using them in roles they are suited, it is much easier to retain a relaxed atmosphere. We reminded our team that the client team was composed of engineers who went into their professions because they wanted to build things; and that they, like our team, wanted to do a good job.

Remember the power drivers for change mentioned earlier? Leadership is the most potent lever of the power drivers. When the team was in a quandary about whether to propose options, the Sr. VP for Global O&G encouraged them to "go for it if you believe in it."

Positive leadership coupled with customer focused preparation were the critical success factors to winning against enormous odds.

The entire leadership team retained this positive and relaxed stance through out the six days. It reflected in the meeting talks and ultimate success.

The most exhilarating moment came during the hour the buyer was reviewing the breakout sessions. Our team met. People know when they've done a good job—and this team celebrated by breaking into applause from the enormous pride they felt from their effort. *What a reward money can't buy!*

With only six clarifications required, we made the short list.