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IMPROVING YOUR PROPOSAL PRESENTATION: *TIPS FROM A BUYER IN THE TRENCHES*



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Presented by



WHAT IS A POST-PROPOSAL INTERVIEW OR PRESENTATION?

It is the most important part of the selection process from a buying organization's¹ perspective. A scored interview or presentation ("I/P") is a required component of many Requests for Proposals (RFPs). Those invited to give a presentation are competing against the best of the evaluated proposing organizations¹, so bring your A game. Presentations allow for spontaneous interactions that require the presenters to think on their feet and respond to topics that may have been under emphasized in the RFP. It also provides insight on working with the prospective selling organization by watching the interaction within the seller's presentation team and looking for indications as to how this team may interact with the Buying Organization.

As the basketball adage goes, you must be invited to the dance before you can win a championship. So, if you are invited to give a presentation, welcome to the dance! Take a few minutes to celebrate, but then get to work. There are many things to do.

Many of the ideas introduced in this paper build upon the ideas raised in a previous white paper titled "Improving Proposal Responses: Tips from a Buyer in the Trenches." While the writer has developed this paper as a stand-alone work, reading the Responses white paper will assist in understanding some of these topics more completely.

1 PROVIDE

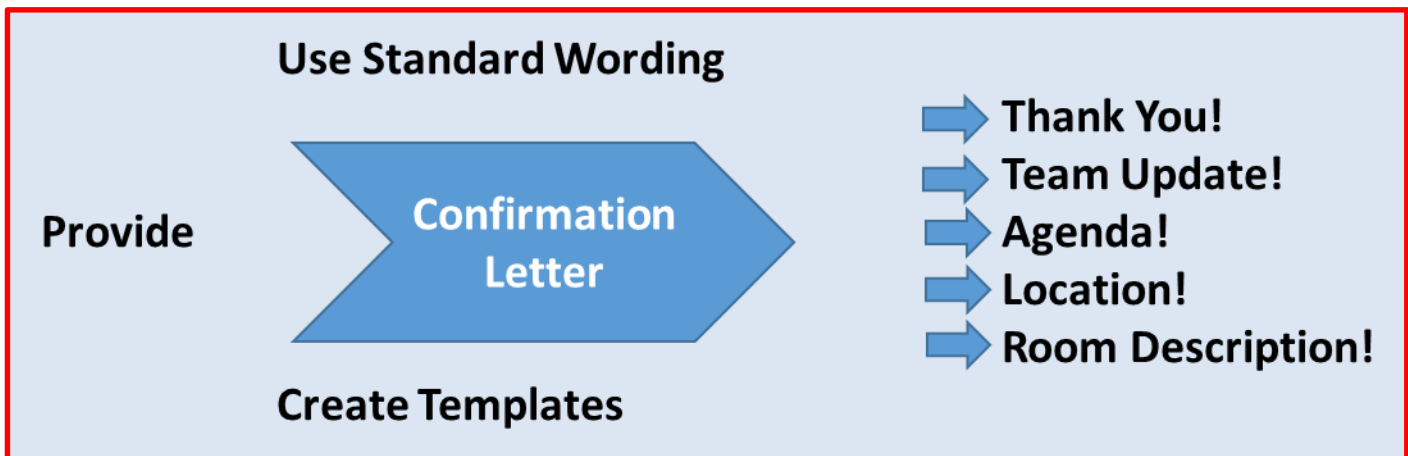
Provide a timely and well-crafted confirmation. This is a good place to use checklists and templates - simple tools that facilitate identifying nearly everything you need to do, raising topics needing to be address and providing carefully scripted wording to ensure all issues/actions are effectively carried out. Your confirmation should be well organized, crisp, and yet thorough.

¹ The terms Buyer, Buyer's Organization, Buyer's Evaluation Team and Buyer's Selection Committee all interchangeably refer to an organization that is seeking proposals for specified goods and/or services. The terms Seller, Seller's Organization, Seller's Presentation, Proposing Organization Team all interchangeably refer to an organization that has submitted a proposal that addresses the buyer's goods or services as defined in an RFP.

IMPROVING YOUR PROPOSAL PRESENTATION: TIPS FROM A BUYER IN THE TRENCHES

If you have yet created such tools, consider while drafting that first response that it will become your template and consider addressing the following items.

- Start the correspondence with a thank you for the opportunity and indicate that you look forward to better understanding the buyer's needs and demonstrating your capabilities.
- Request the names and titles of the buyer's evaluation team; knowing your audience enables you to better present and tailor your unique value proposition.
- Provide the names of the key personnel presenting and indicate any changes from those identified in the proposal. If there are new names, request permission to provide the new key personnel's resume/CV before the presentation. Do not surprise the evaluation team, and do not submit anything without the buyer's explicit authorization, each organization has rules for data submission timing.
- Request an agenda if the buyer has not provided one. If they do not provide one, suggest what you believe they are looking for and if they approve or comment, then you will better know their areas of focus.
- Confirm everything you can about the location, date, and timing. Where is the actual I/P location? How much time is available (including set-up/tear-down)? Ask what to bring! Lastly, request a detailed room schematic (or description) so you know where power outlets, data drops (or WiFi), projector, seating and possible display areas are located. You want to be totally at ease when you walk in the room.
- Designate a single point-of-contact for the buyer, including contact information. It should be the Project Manager/Lead or a Managing Principle, and provide a back-up contact as well. This accomplishes to two things: it 1) facilitates communication with the buying organization and 2) demonstrates that the project leadership is now in place and has begun to own the project.



2 PLAN

Determine the presentation objectives

The overall objective of these presentations is first to inform and then to persuade.

1. Leave no doubt that your organization is exceptionally well-qualified with numerous examples of success in substantially similar situations. Be careful to not appear overqualified—evaluators may be concerned with your commitment and the assignment of resources throughout the life of the project.
2. Leave no doubt that the project team is exceptionally well-qualified, will be assigned to the project for the duration of the project, will be easy to work with and volunteer the percent of each of their time that will be dedicated to the project.
3. Demonstrate that you clearly understand the buyer's situation, that their concerns are thoroughly understood, and how these concerns have been managed on other projects.
4. Demonstrate excitement for the opportunity and a commitment to be successful.

Evaluate what's to be included

In many cases, the buyer will provide an agenda. Thus, developing your plan first involves ensuring that you address these agenda topics. Consider also providing the following:

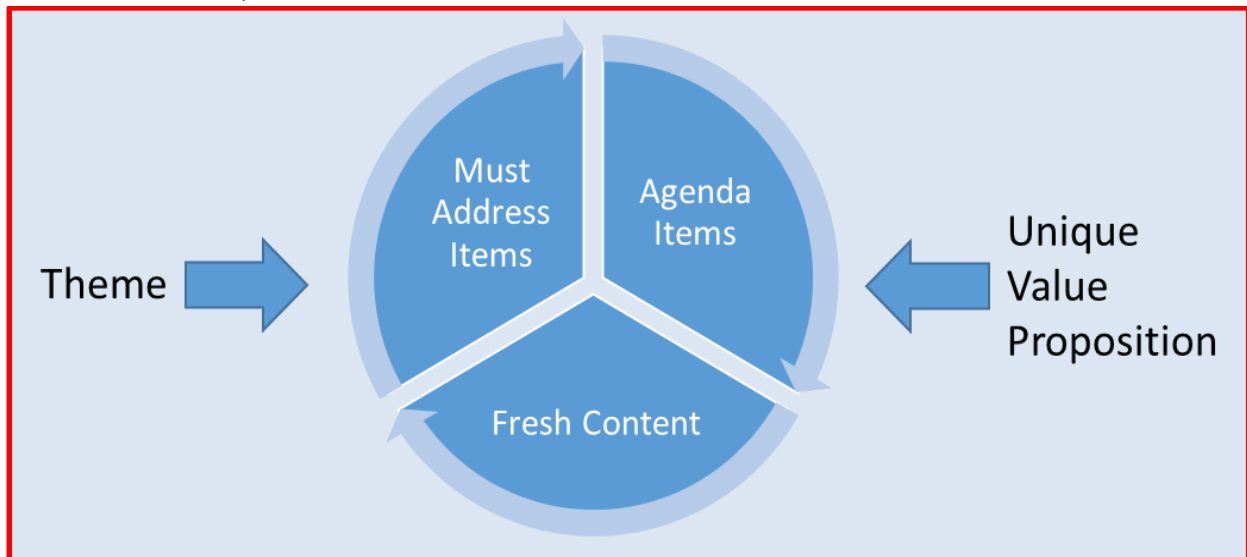
- Fresh content that continues to clearly demonstrate your unique value proposition, including new examples of actual work to show added breadth.
- More detail into the proposed solution.
- How the solution will be managed to deliver the desired results and how the use of tools will support the process.
- How the budget and schedule will be managed; these are often areas of significant weight in the decision process.
- A listing of questions where the Buyer's input is needed.
- The 'Must Address Areas' referenced in the "Improving Proposal Responses" white paper you may have incorporated into your written proposal (see below).

Must Address areas

(adapted from "Improving Proposal Responses: Tips from a Buyer in the Trenches" white paper)

The writer refers to the following as "Must Address" topics due to their importance in developing a complete value proposition. Every seller presentation should effectively demonstrate the following.

- The business is viable, capable, successful, has a practice focusing on the Buyer's specific opportunity and can complete the work without financial or personnel distractions.
- The expertise of the people performing the work has adequate education, reasonable tenure and have numerous examples of relevant experience.
- The team's expertise aligns with this specific opportunity, made obvious by providing actual work examples (and not just general or unsupported statements).
- The proposing organization sincerely understands the work from the buying organization's perspective. The customer has a specific challenge and is unlikely to trust anyone that cannot see it the way that they do, so consider including:
 - Current state of opportunity and ask the buyer to comment/confirm;
 - Interactive project plan, allowing for the buyer's input;
 - Areas of project risk and risk mitigation possibilities for discussion;
 - Provide the benefits of successful completion; and
 - Provide a Return on Investment (this is often omitted, yet it's important).
- Your unique value proposition of the proposing organization—answer the question, why the buyer should select your organization (differentiation cannot be overstated).



3 PRODUCE

As you create the content for your presentation, you should critically evaluate how each statement or example:

- Follows the theme laid out in your written proposal,
- Helps demonstrate your unique value proposition, and
- Creates clarity in describing your solution.

Also consider the presenter's comfort in making the case for each fact, especially if a great deal of detail is needed to adequately develop the point. While the buyer's evaluation team will have read and scored your proposal, evaluators' have other responsibilities and work demands and may have reviewed 10-15 proposals, which may affect their complete retention of everything important in your specific proposal. Start by reinforcing the highlights of your proposal to refresh their memories. Then you can reinforce, anchored by new information and with the proposal providing context. By helping the evaluators link new information to your proposal strengths, you better demonstrate your depth of experience and outstanding capabilities.

There are so many ways up the mountain that selecting the best trail may be less important than ensuring your arrival at the top. So, whatever your approach to developing your I/P, you're on the right path if you have generated a list of things to include, considered how they support your narrative and tie them into your unique value proposition.

1. Consider starting by developing an outline that supports your narrative and links each topic to the theme and your unique value proposition.
2. From there, you can create a storyboard. Using your outline, stick the components of your I/P to a wall and start ordering and reordering them so they tell your story. Be on the lookout for additional components that may be needed to fully tell your story. Mark up each page, removing or adding to adapt to your narrative, ease of presenting and to the perceived customer concerns and expectations.
3. With a compelling story on the wall, you can then generate a focused draft. Until the I/P starts to take shape, it is hard to see if there are potential issues related to industry speak, confirmation bias or organizational myopia.

**IMPROVING YOUR PROPOSAL PRESENTATION:
*TIPS FROM A BUYER IN THE TRENCHES***

4. Now is a good time to ask your team to brainstorm and prioritize the impacts against the following two lines of questions:
 - a. Identify what may have missed the mark. If something were to go wrong, where would it be? Have you over or under-scoped what the customer really wants? Do you really need everything proposed to accomplish the task at hand? What might the buyer have difficulty believing or understanding?
 - b. What will your competitors have addressed that you have not? How will their approach be different? Does this change your narrative, content or solution?
5. Now assess how this impacts your I/P content and narrative and generate your final draft.

4 PRACTICE

It has been the writer's experience that many evaluation teams tend to overweight the key personnel and proposed team over the company's capability and reputation. This makes it critically important to have a seamless presentation, demonstrating mastery of the material and the cohesiveness of the team. This makes practicing the presentation particularly important; you want build trust in your team and its approach to a solution. The interaction of the team is easy to read, so be sure to call each other by name, mention other's experiences and act comfortable with the team.

Time management

Using your final draft, conduct a dry run to determine how much time it takes to present without customer interaction. Since you are actively designing your presentation to be interactive and thorough, you will need to have your presentation planned to underrun the allotted time. It is also a good strategy to inconspicuously mark the less critical slides so they will be easier to identify and quickly summarize or skip over if necessary.

How much time to allot for customer interaction is not mathematically determined. The writer recommends that you include one to two minutes of customer interaction time for each ten minutes of time allowed to the I/P. This is time to actively engage during the I/P as well as time for Q&A at the end. Also consider the complexity of each issue, the number of topics to be addressed and developing your unique value proposition.

Who should take the lead?

The opening typically sets the tone for the entire presentation. Equally important is maintaining momentum. Having a good presenter that is comfortable in front of people and can think on the fly helps a solid technical proposal become an effective instrument of communication. If there is no one on the team with those skills, consider bringing in an executive with good presentation skills to facilitate the presentation. The executive can do more than just improve the presentation; their interest and presence will be seen by the buying organization as high-level support for the project.

It is no secret that public speaking is not a skill that everyone possesses in equal measures. In fact, some exceptionally talented people with superb technical skills that perform brilliantly one-on-one have challenges presenting. A good facilitator can ask questions of these technical experts, making it easier for them to demonstrate their expertise by responding to questions within their areas of expertise.

5 PRESENT

10 Things to Be

1. Be Early

Being early:

- Dramatically reduces stress,
- Provides additional rehearsal time,
- May create an opportunity to see who some of the competition is. This will allow some last-minute fine tuning to distinguish you from at least those competitors. The best way to do this is without naming them.
- THE RULE is to always complement the competition if mentioned by name; remember that the same evaluation team invited both teams to present. Complementing the evaluation team's other invitees complements the evaluation team's selection process. Perspective adjustment— they got your company right, didn't they!

2. Be Prepared

Set-up quickly and be prepared to start quickly. Everyone on your team should have a role; this demonstrates good planning and teamwork. To be prepared, consider the following:

- Come with two electronic copies of the presentation in case one gets corrupted.
- Provide value-add handouts, including:
 - Presentation team, complete with related career highlights and contact information;

IMPROVING YOUR PROPOSAL PRESENTATION: *TIPS FROM A BUYER IN THE TRENCHES*

- Copies of the actual I/P hand out or as a back-up should you experience technology misadventures;
- Sample outputs; and
- Outline of key unique value propositions.
- Ask for assistance. You are the Buyer's guest and they want you to do your best. Things like technical issues may arise but they do not have to be the kiss of death.
- Use the restroom before the I/P.
- Bring your own water or energy drink.
- If you bring food, bring a variety (everyone is getting so picky!) but do not eat it yourself.
- Dress the part, like what you wear everyday performing your job duties. For example, if you normally wear a polo shirt for work, you might look uncomfortable if you wear a suit to the I/P.

When you are prepared, bells and whistles are only of modest importance. However, to the extent that they support the narrative, add value or further prove the solutions, they should be carefully incorporated. Make sure they do not distract from the theme of the I/P; otherwise, they may look gimmicky.

3. Be the Actual Proposed Work Team

Plan so the team performing the work is available for the presentation. Few things are as concerning to an evaluation team as not having members of the proposed team available to be questioned under real life situations.

Once you have confirmed the team and provided credentials, do not change up the team. Unless a team member literally "wrote the textbook" and has industry wide expert credibility, then his/her absence is not likely to be well received. Selection teams need to assess the work team and its peer dynamics and compatible working styles.

4. Be Personable, but Keep it Professional

The customer is evaluating you as a potential partner, so be approachable. Start the meeting by introducing your team, including their role and relevant expertise. Provide something notable about their professional background that supports your theme or unique value proposition. You may think personal information is interesting, but it seldom creates the human link intended, and, in most cases, it creates a distraction.

5. Be the Experts in the Room

Remember, you were invited to present. Evaluation teams are keenly interested in how your ideas will help them solve a problem or maximize an opportunity. It is likely that

IMPROVING YOUR PROPOSAL PRESENTATION: *TIPS FROM A BUYER IN THE TRENCHES*

your expertise level exceeds that of anyone on the evaluation team, so you are not likely to have to defend yourself against a hostile technical audience. Thus, be confident of your experience and your approach. Have a smile, make eye contact, and stand tall—all positive body language. The goal here is to demonstrate an impressive technical background and your credibility to effectively contribute to the success of the project/opportunity at hand. Keep in mind, though, people respect experts, but no one likes the person who has to prove that they are “the smartest person in the room.”

6. Be Empathetic

Address the good, the not so good and the ugly. Spend time discussing the opportunity from the buyer's perspective, good and bad. Stay humble by acknowledging that you do not know all of the issues that the customer must address. Asking questions and restating what you heard shows that you want to understand the situation more completely. Similarly, consider asking the buying organization if they think your proposed solutions are reasonable or possible. This demonstrates that you will not try to prescribe a solution you do not completely understand and may encourage the buyer to provide additional information.

Consider having one of your team members take notes regarding the new information provided by the buyer. These notes will enable your closing presenter to clarify any mistaken assumptions or fill any holes in your presentation—demonstrating that you have carefully listened and now better understand the buyer's needs.

7. Be Able to Provide Many Actual Examples

The evaluation committee is interested in hearing about your actual experiences in delivering similar solutions. This is especially true in the government arena where governments do not wish to take risks with the taxpayers' money.

Evaluation teams are typically looking for organizations that have relevant experience that demonstrates they have been successful many times with similar projects. Review your experiences so that you have multiple examples for every aspect of the work.

Having numerous examples ready enables you to quickly address topics that the customer may bring up while you are presenting, and different examples will provide more opportunities for the individual evaluators to relate to topic. Few things impress selection committees more than a spontaneous conversation where the presenter is taken off topic and yet still can refer to numerous and relevant actual examples.

8. Be Flexible

Often, evaluation committees will not follow your well-prepared and rehearsed agenda. They may want to discuss things brought up in your proposal but not included in your presentation. Be prepared to entertain those as they come up. Asking a customer to hold off until the end of the I/P stifles creativity and creates doubt. Worse, it may cast your team as lacking in breadth of experience, rigid and potentially difficult to work with.

9. Be Firm

While the customer might act as if it would be your privilege to work for them at no charge, the evaluation team knows that the deal must meet both party's needs. Properly

IMPROVING YOUR PROPOSAL PRESENTATION: *TIPS FROM A BUYER IN THE TRENCHES*

scoped and priced proposals are the result of the tasks and materials necessary to provide the solution. If you are tested on your price, build credibility by being firm on the tasks that you believe you need in order to deliver the solution, and be prepared to describe your pricing methodology. Providing suggested modifications to the requirements that could lower the cost shows both flexibility and allows the buyer to understand the value you have proposed. This also opens the door to offering additional tasks and their benefits that would lead to an increase in scope and price.

10. Be Ready to Close with the Positives

It is important to build up momentum through your presentation. Close with energy and confidence in your solution, capabilities and results you already have delivered for other organizations.

A positive and upbeat close might include the following.

- Use notes collected by the note-taker mentioned in 'Be empathetic' above.
- State what you have learned from the interaction.
- Ask if there are any areas still of concern or those that were inadequately developed. If so and if you can, address them right then.
- Summarize your unique approach.
- Highlight the major topics already developed.
- Summarize how the team's strengths matches the requirements.
- Replay any action items that you may have agreed to during the interaction.
- Thank the Buyer's team for the opportunity.
- Indicate that you look forward to hearing from them.

CONCLUSION

In summary, much of the theme of this paper is suggesting that presentations and presenters avoid demonstrating the arrogance of successes. Many buying organizations have modest experience with and an incomplete understanding of many of the items and services they need. This leads them to believe that their problem or opportunity is more unique than it is. Where this might be the case, it might be tempting to provide a cookie cutter solution, play down the risks, throw in a little swagger to demonstrate how good you are and then end with a trust me closing. The writer's experience has been that this is unlikely to be an effective way to win business.

Evaluators are typically among the brightest in their organization and trusted in making important decisions. Their lack of experience is not a lack of capability, which means they will quickly identify and potentially resent those who are talking down to them.

Instead of the arrogant expert, consider being the humble expert. This expert asks questions and provides educational information and context so that the evaluators feel understood and competent in selecting the best fit provider. This strategy also creates trust. So, when presenting...

- Show that you understand what the buyer believes is important by asking them or by listing what you believe they are and seeking their confirmation.
- Remember that the buyer wants its needs to be clearly understood, so make sure to demonstrate that you understand what they are facing.
- Build off the previously provided examples with additional examples, which demonstrates mastery and creates credibility.
- Leave nothing to chance; plan, practice and execute using all available resources.
- Close strong, interested and committed to the project.
- Be the business partner that the buyer needs.

ABOUT DALE JORDAN

Dale Jordan has been in his role of Procurement Director for Cherokee County since 2012. Dale's interest in purchasing started at Florida State University College of Business, where he earned a B.S. in Management, with an emphasis in Purchasing and Materials Management. Initially, Dale served in commercial purchasing roles for over eighteen years. As a practitioner of procurement best practices, Dale has developed and presented workshops and presentations addressing Supplier Selection and Management, Industry Analysis, Negotiation Strategies, Demand Consolidation and Price and Cost Analysis. In 2017, Dale lead the Cherokee County Procurement Department to achieve National Accreditation by the National Institute of Government Purchasing (NIGP). While Dale obtains great satisfaction from contributing in the professional arena, his roles as father, grandfather and husband are areas of his greatest fulfillment. Dale's other passion is music, which has him attending numerous concerts and dabbling in songwriting, playing guitar and home recording, when he can keep the family French Bulldog from contributing vocals.

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