

6 Keys for Planning Stellar Oral Presentations

Article by

Dave Alexander,

Lincoln Strategies, LLC

dave.alexander@LincStrat.com

978-369-1140

www.LincStrat.com

Mr. Alexander helps professional services firms and manufacturers enter, expand, and excel in federal markets. He has proven expertise in helping organizations achieve their government marketing goals.

A note about the newsletter in which this article appeared:

Published by the Wellesley Hills Group, *Rainmaker Report* is a premier online source for insight, advice, and tools for growing service businesses.



6 Keys for Planning Stellar Oral RFP Presentations

By Dave Alexander

Firms that respond to Requests for Proposals (RFPs) know the work usually involves two phases: writing the proposal and delivering an oral presentation. While many firms ace the proposal writing, too many botch the presentation, and lose the contract. More firms would succeed at presentations if they realized they needed to plan for orals while they wrote the proposal and didn't wait until afterwards, and suffer as a result. Here are six areas to consider:

1. Avoid the Crunch After the Crunch

Most RFPs state that oral presentations happen thirty to forty days after the proposal due date. Proposal managers think, "Five weeks! We have an eternity to plan for the orals," and don't bother with presentation planning until after the proposal is written.

What happens when managers wait? A number of things:

1. The proposal's budget is shot by the time the written proposal is delivered, and the proposal manager is left with wildly insufficient resources to prepare for orals.
2. Not even knowing they would be expected to help prepare for orals, team members dive into other commitments or go on vacation as soon as the written proposal is submitted.
3. By the time the proposal manager decides to focus on the oral presentation and rounds up others to help, "eternity" has shrunk to ten days.

The solution: Plan and budget for the orals at the same time you are planning for the written proposal. In assembling your proposal preparation team, don't just load up on writers; also draft staffers skilled in preparing presentations. In the kickoff meeting, be sure that everyone understands that the written proposal is only half the battle. Assign explicit responsibilities for preparing the presentation.

2. Learn the Formal Rules as Soon as Possible

RFPs often specify detailed rules for the oral presentations. Don't wait until after submitting the written proposal to learn these rules, as this can be too late to avoid major problems.

Here's a common example:

A firm's written proposal specifies John Doe as the project manager.

John is a terrible public speaker, but the proposal manager is not concerned. The firm's principal, Mary Smith, is a wonderful speaker, and she will give the presentation.

After submitting the written proposal, the proposal manager discovers a problem. The RFP's rules specify that

only one person is allowed to deliver the oral presentation – the proposed project manager. The firm's chances for victory will ride on John's (non-existent) skills as a public speaker.

Had the proposal manager read this rule earlier in the game, he could have assigned someone who is skilled in public speaking as the project manager, while still including John on the team. But it's too late now.

The solution: Read the rules for the orals as soon as the RFP is issued. Who can deliver the presentation? How many slides can be presented? What is the time limit? How many hard copies of the slides are you required to bring with you? Are you allowed to present pricing information?

Learn these rules early, and incorporate them into your planning. Avoid a flurry of last-minute, anxiety-provoking changes at the very time you should be polishing your presentation.

3. Learn the Unwritten Rules, Too

When I am retained to help a firm prepare its oral presentation, I always ask about the "unwritten" rules for the presentation, to help guide our planning and preparation. For example, does the company or government agency that issued the RFP:

- Have a strong environmental ethic – a culture in which any perceived lack of sensitivity to this issue is a problem? (Hint: print the handouts on double-sided, recycled paper.)
- Have a tradition of peppering presenters with tough questions or otherwise creating tests of fire?
- Reward presenters who are especially succinct, and who can deliver material in well under the time limit specified in the RFP's formal rules?
- Place a premium on presenters' understanding and use of obscure, client-specific jargon?
- Frown on consultants who don't "get" the dress code?

Failure to identify, prepare for, and accommodate the unwritten rules can doom a presentation before it starts.

The solution: To learn the unwritten rules, ask colleagues in your firm or others who might have first-hand knowledge of the organization's culture. Call the contact listed in the RFP, and simply ask that person directly. Tactful questions can impress the buyer that you are a careful, client-centric firm that knows the value of planning ahead.

4. Check the Venue Far in Advance

When planning for orals, it is never too early to scope out the logistics. Disaster can strike if you rely on assumptions. It can be tragic, for example, when the presentation team:

- Shows up at the buyer's office building at 8:45 am – 15 minutes early, just as planned – only to discover that at this peak time, it takes 20 minutes to make it through the lobby's security screening process, get an elevator, and arrive on the appropriate floor.
- Is unable to project its slides, because of incompatibilities with the client's technology.

- Discovers that the layout of the room is radically different than what had been assumed, leading to awkwardness in the presentation.

The solution: Assign someone from your team to learn everything there is to know about the presentation's logistics. How much time should be planned for getting to the assigned conference room? How will the room be arranged? Will you be facing the audience in a "lecture" arrangement, or will everyone be seated around a table? Where will the computer and projector be situated? How will the speaker control the slides?

5. Don't Deliver a Pitch, Provide Free Consulting Instead

When I ask new clients about their ideas for planning their presentation, in many cases they tell me about one of the following "killer" ideas:

1. We'll explain our skills and in-depth experience. By the time we're done, the evaluation panel will just know that we're better than any of our competitors.
2. We'll verbally summarize the written proposal.

These are killers, for sure. Most members of the evaluation panel will not want to sit through a marketing pitch, and will feel patronized if you offer an oral version of the Executive Summary.

The solution: Make the presentation client-centric. In the first 20 seconds, announce that your presentation will provide the audience with:

- Value-added content, such as lessons you have learned in performing similar projects for other clients, and how those lessons might apply to this client.
- Innovative ideas for addressing this client's specific issues.
- Your thoughts on the project's key risk factors, and how your firm represents a "safe buy."

Delivering on these promises requires lots of prep time. You'll never get there if you wait until the last minute to plan the presentation.

6. Practice – Early and Often

An unpracticed presentation is easy to spot: the narrative meanders; handoffs are performed clumsily; individual presenters lose track of time; tough questions from the audience seemingly catch the presenters by surprise; and time runs out before the presentation is done.

The solution: Firms that excel in orals practice their presentations endlessly – even obsessively. They run full dress rehearsals, with tough practice Q&A sessions.

* * *

When planning for a competitive oral presentation, time is your friend. Don't squander it! For any given RFP, your firm might have vast relevant experience, an excellent group of proposed personnel, and a solid technical methodology – all of it described compellingly in your written proposal.

But you will not do as well as you could have in the oral presentation unless you start the planning as early as possible, rather than assuming that you can make up for lost time after finishing the written proposal. Lost time cannot be regained. When preparing for an oral presentation, start the planning early: it's a luxury you have to afford.

Dave Alexander, president of Lincoln Strategies, LLC, provides strategic, marketing, and management advice to firms interested in entering or expanding within government markets. Dave serves clients in such areas as PR, management consulting, engineering, and environmental services, as well as manufacturers of high-tech equipment. Contact him at dave.alexander@LincStrat.com or at #978-369-1140.