

“JUST ONE MORE QUESTION”

(Spend More Time Defining the Need)

When you lose a project in a competitive bidding situation, many possible reasons exist as to why the client might have opted for another firm, and many factors likely affected the decision. However, in my own experience, I've never come to the conclusion that we lost in a competitive bidding situation because we had compiled too much information beforehand.

Spending time discussing the proposed project up front and gaining a thorough understanding of the task at hand has several distinct payoffs:

- *Demonstrates your commitment to the client*

During the proposal development and follow-up phases, you have an opportunity to give the prospective client a sense of how responsive you would be, should your firm get the business and they become your client. The more detailed you are in defining the project requirements up front, the more you demonstrate the responsiveness (another absolutely essential quality in professional services) you'll exhibit during project execution. And if you've never worked with the prospect before, other than the claims you make in a proposal or statement of qualifications, this is the only basis upon which they can gauge your ability to demonstrate that quality.

- *Avoids problems down the road*

Improperly defining the scope of the proposal and subsequently the project generally has several possible consequences: write-offs, deliverables that don't meet the client's expectations, budget expansions that the client didn't anticipate, or perhaps even project cancellations (when the client discovers he or she has opened up a can of worms with the project). Even if the project continues, improper assumptions will render elements of the completed work useless and necessitate re-work of significant portions of the project.

- *Enhances your reputation and perception*

If your proposal does not specifically define the project scope, you have the potential implication of improperly identifying or altogether missing problem issues up front. The client may then suspect that

you have purposely defined the scope loosely in order to “low-ball” the price, with every intention of tacking on expansion items at a later date.

■ *Demonstrates expertise*

By asking for clarification, you bring up issues that the potential client and the competitors haven’t even considered. Just by demonstrating your understanding and anticipation of potential issues, you will have a leg up even before the proposals have been submitted.

■ *Positions you for future work*

Often when you out-hustle the competition during the proposal definition and submittal phase but do not receive the business, the client feels a sense of obligation and is apologetic for the decision. This goodwill can sometimes pay off in the future, as the client feels as though a sense of fair play is appropriate, reciprocating your efforts with a future project award.

To ensure you get all the information you need, sit down with your proposed project team and compile a list of questions that you feel require clarification, and then set up an appointment with the client to discuss your issues via conference call, if a face-to-face meeting is not practical. Conduct this inquiry in such a way that it minimizes the inconvenience to the prospective client. If you disrupt his work schedule too often or ask for detailed written responses, he may have concerns that you are the type of service provider that requires a great deal of hand-holding or that is incapable of working independently when necessary.

In general, don’t ask for a written response unless the client prefers that approach. Sometimes clients do prefer this approach so they can discuss the questions internally, provide a consensus response, and ensure consistent communication of that information to all competing firms. A prudent approach is to agree to document the details of the conversation and to provide a written summary to the client for confirmation purposes. In this way, you provide a valuable service to the client, begin to build a relationship with him or her, and clarify the issues that provide you with a roadmap for developing a well thought out proposal.



The bottom line: Never be timid about further defining the project requirements. Your client will appreciate the effort, and you'll be glad you did.

ABOUT THE AUTHOR:

This article is an adapted excerpt from *Selling the Fuzzy Widget: Secrets of Selling Professional Services* by Craig Cortello. Craig is the President and founder of Fuzzy Widget Sales Solutions, a sales consulting and training firm dedicated to serving professional service industries. He is also the National Sales Manager of Trinity Consultants, a nationwide environmental consulting firm, an author, an entrepreneur, a Rotarian, a husband & father, and an accomplished musician.

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