

California Chapter Training Day
Held at: Disney's Grand Californian Hotel & Resort, Anaheim
Friday, Oct. 25, 2013

The Client-Consultant Relationship Panel Discussion

Introduction:

Experienced capture and proposal development consultants can bring new skills to your organization and help you “step up your proposal expertise.” The most critical factor in successfully using consultants is the client-consulting relationship. At its October 2013 Training Day Symposium, the APMP California Chapter invited several consultants to discuss their experiences and advice for a successful client-consultant relationship. The panel consisted of:

- Ed Alexander, Shipley Associates
- Gerald Gutierrez, SM&A
- Mike Parkinson, 24 Hr. Company
- BJ Lownie, Strategic Proposals (moderator)

[Transcription from recording]

BJ: Our objectives are to understand when to use a consultant, understand how to source and select a consultant, and to understand what to expect when you use a consultant. Also, if you are a consultant, here's how to behave and here's what you should be doing.

How do you set up a successful relationship from both sides? What are potential obstacles? When should you use a consultant, how do you find them, how do you qualify them, and what should you expect?

Questions posed for consultants to answer

1. When Should a Customer Consider Using a Consultant?

Gerald: I think a couple of factors come into play. One is how critical the proposal is to your company. There's a level at which it doesn't make sense -- \$10M? \$100M? The other is what does your internal capability look like? Do you have the internal resources to staff a proposal development effort from the perspective of a proposal manager, volume lead, and for production and graphics? Third, what kind of independent view are you looking for?

The more critical and more constrained you are internally, the more you typically need to look at bringing on a consultant to help you out.

Ed: We want to leave residual value, so you bring in a consultant for training. You want a consultant to shadow your people, come in at various milestones, and be a ‘sobriety check’ at key points. Training provides one of the best ‘bangs for the buck.’

BJ: I want to underscore the objectivity piece that Gerald raised. We come in and do assessments and benchmarks. We jokingly refer to ‘benchmarking in the barn.’ Fred and Elmer have been working in the barn all day and they’re getting ready to go out. Fred asks Elmer if he smells OK, and Elmer asks Fred if he smells OK, and they both agree that they smell fine. You don’t get the best assessment without objectivity.

Also, you don’t need certain expertise in-house all the time, so that’s when you want to look to an outside consultant.

2. How Do You Find Consultants and How Do You Qualify Them?

Mike: When I’m looking for a consultant or when someone is hiring me, first and foremost, I go to someone I trust whoever has had experience with this organization. I ask, “What was awesome and what stunk?”

Gerald: Referrals are the strongest way to ensure success. All the major proposal outfits are associated with APMP, so I see who is associated there. That’s an excellent way to look at it.

In terms of qualifying, look at referrals, but also ask whether the consultant has done the type of job that you’re looking to source. A \$14B aircraft capture and proposal manager may not be the best fit for a \$15M IDIQ services contract, and vice versa. So look for leadership and a good emotional quotient, but also relevance in the type of jobs the consultant has done in the past.

Ed: Yes, relevant experience is critical. Not every consultant can do everything. You have to vet them. Also, you need a good idea of what you’re looking for. Not just a proposal manager, but what kind of proposal manager? Do some homework and have a good idea of what you want in a proposal manager.

Mike: A trick I learned when we’re bringing people on, especially designers, is that I’d ask to see their portfolio. When they show me their portfolio, if they’re showing you your competitors’ proprietary information, do not hire them. (Unless they have permission from the client to share.)

BJ: NDA’s should be first and foremost with any consultant. One of the first things I say when I get a phone call is, “I assume we are under NDA until we have a signed agreement.” I know that that counts with a client. When people ask if they can see examples of our past work, we tell them no, we can’t share them, except for some redacted examples.

We use referrals, and I want to underscore – there are referrals of, “Hey, call this guy,” and then there are true references. The consultant should be able to give you a couple of people who have worked with them on similar work. I have a list of references and I change them so the same clients aren’t being bothered all the time, but I never prep them. I tell the prospective client to call them. I tell my references to be direct, be candid, to say whatever you want because I’m confident with my clients that they will say good things.

We get maybe 30% of our requests for consulting from APMP’s web site.

When sourcing and selecting, look for honesty. I ask, “Do you work in federal or commercial?” If they are looking for a federal proposal consultant, I refer them elsewhere – we do mostly commercial. I could do it; we could take it on, but we wouldn’t do it very well.

3. What Should a Customer Expect From a Consultant?

Ed: You expect the consultant to be the honest broker who can assess the situation and give you an honest opinion. How does the opportunity stand up? Sometime we’re called in to save the day. We get called and asked, “will you come in,” and we say no. You can’t expect the consultant to come in and save the day when the door is already shut and you can’t concentrate on shaping the battlefield.

I think you need them to come in expecting to be prepared. You need to tell them what to expect. They need to know the deliverables you expect. They need to know the tools and templates and the schedule they are given. They will be there, be available, and do the job that they are hired to do.

Gerald: I absolutely agree that honesty is #1. You can test this. If you have the situation where you have a 500 page proposal due in three weeks and the consultant says he can take care of it himself, you can get it cheap, but you probably will have a non-compliant response. An honest consultant will tell you what can and can’t be done, and they will walk away from a job if they can’t meet the expectations. I’ve had these conversations with clients many times. I say this is what it’s going to take, and if we can’t agree on it now, I’d rather that we part as friends now than have you get something you’re not satisfied with.

Second, you need knowledgeable insight. The consultant should say, “Here’s what we’re going to do for you.” Day 1 there should be a kickoff meeting, where you sit down and identify who the authors are and what the schedule is. The consultant should paint a picture for you that leaves little or no ambiguity as to how you’re going to get from here to there.

Finally, you should be looking for a collaborative but honest partner. Someone who’s going to work with you together on the effort and get through the adversities, but who in a respectful way is going to be honest with you if you’re not going in the right direction. You don’t want someone who keeps saying, “Yeah, things are great, this proposal’s going to win,” when that is not the case.

Mike: Emotional quotient, something Gerald mentioned, is really important. I want to make sure this person works well with the team. The consultant needs the skills not to ruffle feathers and be flexible enough to work with the in-house processes.

Is there a contingency plan? What happens if something goes wrong or a person gets sick? How do you keep the train moving forward?

BJ: You should expect value. We give a little at the front. We don’t start the clock when we start talking. You should get more than you expected. If all you get is what you expected or even less, then something is wrong. A consultant is a professional who will satisfy you.

I think of my car being repaired. Every once in a while it comes back washed, and I think, wow, thank you. He does a great job, but I get a little bit of extra value once in a while.

4. Please Tell us Your War Stories Regarding Customer Expectations

Mike: I was working with a company and it was a disaster. We were brought in to help on a process and they were on an emotional roller-coaster. I said to the graphic designer, “How can I find the graphics to make the edits?” She said, “You’ll have to go through the library of 500 images and find the thumbnail.” I told her that a logging system would make it easier to find, and she started to cry. Frankly, I didn’t know how to handle that. So we got it settled down and found the graphic, and she quickly ran to the management and said I made her cry. It was a situation where I should have fired the client.

Gerald: When I was a proposal manager, I thought, I’m there to run the proposal, but the client was expecting authors and solution architects. They had the solution architects in-house, but they were pretty busy, so it was a 100-page response, me and one volume lead and a production lead. Three-week turn. We spent the first week trying to manage the expectations up front, and management’s response was your sales guy promised us you could do this. We finally got to a point a week and a half in where we finally got some dedicated time from their folks, but we lost half of the runway in terms of those missed expectations. So this is why it’s critical to have the right discussions up-front. The first thing I would have said is, “This isn’t doable the way it’s structured, and you probably won’t get the bang for the buck for what you need.” Missed expectations is always a recipe for disaster.

Ed: We had one virtual team and I guess we didn’t scope it quite right. Our person started out being the proposal manager and there were volume leads. Over eight weeks, people dropped off from the team and the proposal effort destaffed. It ultimately became an army of one and the proposal manager ended up doing it all. Interestingly enough, oftentimes, and particularly on virtual teams, the consultant comes in from outside and we expect him to be a team member, but they are perceived as the enemy – “Why are they coming in from outside when we’re slaving away in here?” It can be a significant emotional event to get them embedded into the team environment. It takes someone to stay on top of it routinely through assessments, check on how it’s going, and ensure that we have interest and involvement, not only from the consultants’ leadership, but also the clients’ leadership. If something starts going ‘south,’ make the correction then or it just gets worse.

BJ: The principal person was always on the phone or on his laptop, sometimes both, and saying, “Yeah, I’m listening to you.” He was sort of ‘there,’ but sort of not there. Tight turnaround. Tight deadlines to get things to our proposal writer. We had two proposal writers with a piece of proposal management, the client was supposedly doing the management. The SMEs don’t deliver on time; they slide and the schedule gets more and more compressed. So I told them, “You realize that we’re working nights and weekends and you’re paying twice as much and getting half the quality?” He said, “That’s ridiculous. If you’re working twice as hard, it should be twice as good,” and I said, “No, people aren’t doing their best work after they’ve been working for 24 hours.” I could not get this guy to understand it. To the end, it was this guy saying, “You did not do what I expected.”

They don’t win the award. The receiving client says it’s the single best proposal this company had ever submitted. But they lost – they bid \$11M more per year than the nearest competitor, 15% higher. My client said, “See, you didn’t win.” Wait, so what’s the lesson? Put it in writing? I don’t know. There’s this mismatch.

5. How Do You Establish a Working Relationship? What Makes it Successful?

Ed: Your own leadership has to make sure the people are comfortable with the infusion of a consultant. Second, expectations need to be set. Specifically, set forth what deliverables are expected and be sure they can be met. Third, have a kickoff meeting where you have all the representatives available so everyone is on board before we strike out on this.

Gerald: For a lot of these, honesty and transparency are the fundamental things needed on both sides. You want to be honest with yourself in terms of what you need and what you can afford, and if you don't know what you need, be honest about that. Tell the consultant the challenge you have. A professional consultant is not going to expect you to be the expert, but we do need you to recognize that we're going to have to figure it out together. That's hands-down the most important thing I've found in terms of establishing a solid work relationship. You don't want to get into a position where you start 'nickel-and-diming' the consultant, because at some point, they'll have to back out. Transparency, understanding what you need, and collaboration are key.

Mike: You want to make sure the consultant can do the best work possible and can work with the client's team. The consultant should be the head of the proposal team, not just an arm – not just, "Do what I say," but contribute. Not micro-managing. The consultant helps a great deal. My best clients allow me to do what I'm really good at.

BJ: Three things come to mind for me. Being specific, documenting it, and having respect.

First, let's be specific what we are here for. We provide the proposal writers and we're very clear. Understand, these are writers; you will provide the SMEs...the fodder for our proposal writers to create a rock-solid answer. It's a joint effort. At no time do our writers say, "I'll go off and do the research and I will own the content." You want to be specific what will be done, whether it's writing, whether it's proposal management, or whether it's capture management, etc.

Second is documentation; the contract or whatever. It's said that a contract is only 'as good as the paper it's written on,' but it gives you something to reference back to. So get it in writing. Make sure it's clear to both sides, something you can go back to.

Finally, respect: I give you this example. When we go in, one of the things we provide is SWAT teams to augment staff. We'll go in and say, "We've looked at this and here's what you need. You need three writers, X amount of graphics support, and a production person." The one that doesn't respect our answer says, "Really, do you need all of that?" That's the client that doesn't respect the expertise we bring. The ones that do say, "Really, do you have everything you need? If we blew out the budget, what else would you have?" They are respecting that we bring insights that they don't have. Kind of like a doctor recommending things to a patient, and the patient saying, "Well, I'm not going to take the penicillin, but I'll just take the other two." That's just crazy. It's crazy to pay the kind of money you pay for the consultant and then turn around and not listen to them.

Topic posed to attendees

War Stories From the Audience Were Solicited

Allison Smith (attendee): We had a consultant who started out on graphics and then was going to step in to management while the capture manager and proposal manager went on a long-planned trip. After 3-4 days, our executive VP wants to see the graphics log. I open up the file, and there

is none. That is what this consultant had been hired to do. So maybe it just wasn't on the SharePoint drive. So we go and ask her, and she said, "Oh, I decided we didn't need one." So I went back to the executive VP and said I think you need to have this conversation with her; the two of you need to talk.

Mike Parkinson: We brought in a consultant based on advice from a 'friend of a friend' – no firsthand knowledge of the person. He had typos throughout the first draft of the graphics. He was not thinking through the content. He was a graphic designer who was really just a poor quality Xerox machine. We never asked him back. Now we always ask if a referring person has had first-hand experience with a person.

Tom Leech (attendee): We had a consultant come in and didn't know Frame Maker. He was gone in three minutes.

David Koch (attendee): We had two major proposal efforts last year. On one, capture had been done very well, and on the other there had been no capture. We built two large and parallel proposal teams; then the consultants showed up to manage one of the teams. We already had a proposal manager assigned and they had to carve out who was going to do what. The good part is that the guy who came in did a fantastic job. They also brought in a person who was a graphics designer, but we didn't use her in that capacity. She was supposed to be able to do desktop publishing, but she couldn't do that at all. We lost some time on that, and it really cost us, and that was bad. So the issue was that the executives didn't communicate with the team before the consultants showed up.

BJ: I shared this story at our last international conference. We were asked to bring a proposal manager to an effort that had been going on 4-5 weeks, with three weeks left. We dropped in a proposal manager. Unbeknown to us, there was a proposal manager who was also the lead SME. He held all of the content. It went 'kaboom.' It was bad; it was nasty for two weeks. We got it done, but right until the 11th hour this guy was a hurdle. With a week left, I was talking to the CEO and he said, "I know it's a problem. We're going to fire him, but first we're going to submit this thing."

So we're going to have a debrief a week later. That morning, I'm walking my dog in the woods. There's a person with a dog on a leash, and the dog is pulling hard and just chomping on the leash. I said to the person, "Part of the problem is you've got the leash too tight. If you relax, the dog will relax." He did it, and the dog immediately ran over, sniffed each other's butts, and they were happy. Two hours later I walk into the meeting and realize what the problem was: we never let them 'sniff each other's butts.' It's what you've got to do. That's the answer to your problem. "You two, go to dinner, spend two hours, figure it out, get the angst out of the way, and come back and tell us how you're going to do it." Dogs do it naturally. If you hold dogs too tight by the leash, all they want to do is 'get at each other.' Drop your leash, and they'll be happy.

Question posed to attendees

Any Obstacles We Haven't Covered?

Anita Wright (attendee): Before we can hire a consultant, I have to justify it to the company. There's an internal assessment as to what they really need and the expectation that stops things before we can even approach candidates. One of my biggest problems is that we think we have a great match, and then when the consultant arrives, we say, "Is that the person I hired?" When

they got there, it wasn't really natural – not the emotional quotient, or the leadership, or the management, or the ability to understand the process here. That sets us back and we have to go through a change.

BJ: I'd offer, don't be afraid to make a change. The individual might be hurt or offended, but the company will say, "If it's not working for any reason, let's get you someone in there who works better. We've got a job to do, so let's get a person in where there's a good match."

Mike: Clients need to justify the labor categories they want to hire when they want to get a consultant. Force the consultant to set up a labor category equivalent to your company, so you (the client) have to fight for the company that will do the best job.

Heather (attendee): Go to Corporate and explain why the low-bidder isn't always the best value – will take more hours. Ask for a favor if you need to.

BJ: If you look at it, consultants make a huge amount per hour, but it works out to be about the same as a fully-loaded employee, when you get right down to it.

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Panelist Biographies

BJ Lownie is truly "Passionate about Proposals." He has 30+ years' experience within the proposal arena and has worked on hundreds of proposals and thousands of people have attended his presentations or workshops. He is a recognized thought-leader on proposal development and a popular and sought-after presenter. BJ is a founding member, an accredited Professional and elected Fellow of APMP. Together with Jon Williams, BJ is the co-author of the long-running and very popular proposal blog "The Proposal Guys" (www.theproposalguys.com). Along with Jon, BJ recently wrote and published his latest book, *Proposal Essentials* (available on Amazon).

Ed Alexander, CPP APMP Fellow, is a Vice President of Training at Shipley Associates. Ed is a sought-after facilitator of capture and proposal development training. He has helped many companies improve overall win rates by applying best practices across the business development lifecycle. He has taught over 1,000 workshops and presented to dozens of APMP groups – he is certified to deliver APMP's Foundation Level Certification Coaching session. Ed has experience helping learners apply best practices in B2B, B2G, and international markets. He is an APMP Fellow and is certified at the Professional Level.

Gerald Gutierrez is Vice President of Proposal Leadership for SM&A and is responsible for over 40 proposals nationwide, representing over \$10B in total potential contract value to SM&A's clients. Since joining SM&A in 2007, Gerald has achieved a mean 70% and weighted 89% win rate on proposals ranging from \$10M to \$700M for numerous federal, regional, and state agencies, as well as private companies. Before joining SM&A, Gerald became involved in Boeing's satellite proposals, working on proposals worth up to \$14B in contract value. Gerald holds a BA with Honors from the University of California at Berkeley, and an MBA from the UCLA Anderson School of Management, where he was named Fellow of the Global Access Program and has served as a judge for start-up business plans.

Mike Parkinson, CPP APMP Fellow, is a co-owner and head of marketing at the 24 Hr Company, a 20-year-old proposal marketing and design company. He is also an award-winning author, an APMP Fellow and regularly uses his marketing experience to achieve success for 24

Hr Company and its clients. Through marketing, Mike has also branded Billion Dollar Graphics (BillionDollarGraphics.com) and Get My Graphic (GetMyGraphic.com); websites for proposal professionals.