



# Proposal Tricks & Treats

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# Trick or Treat?

- We now live in RFP NATION.
- Not a State, but a State of Mind.
- Use is increasing every year.
- Won't reverse itself anytime soon.



# We Are More Risk Averse



- Result of popped bubble was loss of \$7.3 trillion in consumer wealth.
- Bought a lot of short answers.
- Corporate scandals followed. Even giants fall.
- Sarbanes-Oxley increases risk in publicly traded world.



# Dear God...



- If Cisco Systems would just get back to \$84 I promise to buy only treasury bonds from now on...
- And, please let me not have to get my resume ready anytime soon...



# Today's Reality

- Individual decision maker gone the way of the typewriter. Still around, but rarely seen.
- Today committees make decisions.
- No one wants to explain to their board or boss that they chose a given supplier because of cocktails at 19th Hole.





# Relationships Still Important

- But increasingly, your relationships only get you on the prospects RFP distribution list.
- Up to you to sell your organization in writing.
- As important as selling in person, sometimes more so.



# Respond?

- You should always respond.
- Even if you lose, you win.



# 3 Categories of Companies



- Those who refuse to respond.
- Those who respond reluctantly and therefore poorly.
- Those who respond and Win!
- The bar is almost always not as high as you think.





# RFPs a Positive Thing



- Ideal format to communicate your organization's key features and benefits.
- Business won through RFP more stable than if won on personal relationship alone.
- Levels the playing field for lesser known organizations, as decisions generally based on "fit".




# RFPs Can Be Fun

- Answering RFPs and writing proposals benefits organization-wide -- audits a company's capabilities and points of differentiation.
- Only sucks if you lose all the time. If you win, it's a lot better.



# Different or Cheaper



- Proposals must differentiate you from competitors.
  - Must communicate clear value proposition and strategic market positioning.
  - WalMart is “cheaper” and Nordstrom is “different”.
  - Robinsons May is bankrupt.
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# Differentiate This!



- All products, services and organizations can be differentiated.
- Just consider Arm & Hammer Baking Soda!



# Positioning vs. Branding



- Branding is far less valuable today than in past years.
- No one is “brand loyal” anymore... Because they’re all good.
- Positioning is what your prospect should think about when they hear your organization’s brand.
- Brands are created, positions are occupied.



# Example:

- Heinz is the brand.
- Ketchup is the product category.
- The positioning is “thicker”.

# A Pop Quiz...



- Visa is the brand. What's its positioning?
- Mercedes-Benz?
- Volvo?
- American Express?
- Diamonds?
- BMW?
- Captain Crunch?



# Proposal Treats

- Always read the RFP three times before writing anything.
- Read between the lines.
- Recording commonalities.



# Proposal Treats, Cont.

- It's not about how are you doing, it's about how are they doing.
- Making the proposal about the prospect increases readership and retention.
- Make your firm's background brief.



# Proposal Treats, Cont.



- Answer the questions in the exact order they are shown, using the same organizational format.
- Make things easy on your prospect.
- Ensure clear, effective communication of key points.



# Proposal Treats, Cont.

- Answer question FIRST!
- Then follow with necessary supporting points.
- Avoid jargon, speak their language, and don't assume they know what you know.
- Don't write for a PhD.

# Proposal Treats, Cont.



- Put details and samples in exhibits.
- Proposal should be a page turner, not a text book.



# Proposal Treats, Cont.

- Avoid the over-use of bullets.
- Bullets are for lists.
- Everything sounds the same when explained in bullets.
- Moby Dick, or A Man and a Fish...



# Proposal Treats, Cont.

- Breathe.
- Walk away.
- Get plenty of rest.
- Eat.
- Clear decks of distractions.



# Proposal Treats, Cont.



- Form should follow function.
- Save photos for brochures.



# Proposal Treats, Cont.



- A proposal should be as long as it is interesting.
- When it begins to bore you, it's gone way too far.





# Proposal Treats, Cont.

- Include a Preface and/or Conclusion section.
- Never asked for, but never offensive.
- Should recap why an optimal “fit”.
- Be sincerely interested and appreciative.
- Recommend next steps.
- Be attentive and follow-up.

# Proposal Treats, Cont.



- Research your prospect.
- Avoid asking questions of issuer.
- Learn something they don't know you know.



# Proposal Treats, Cont.

- Never try to talk a prospective client out of issuing RFP, in fact encourage it.
- Make winning proposal-driven new business a core competency.



# Invest to Win...



- Companies spend on advertising and marketing, but almost nothing on proposal creation capability.
- When increasing your proposal win rate single most effective path to improving your bottom-line.
- Eminently achievable. You can improve your across the table presentation skills, and your written sales skills.



# Happy Halloween!



- New Book: RFP NATION
- Available on Amazon.com and [rfpnation.com](http://rfpnation.com).
- Thanks for inviting me! It's been a real treat!

