



**“Knowledge is Power”**

June 9-12, 2009, Chandler, AZ

October 23 APMP Socal- Anaheim

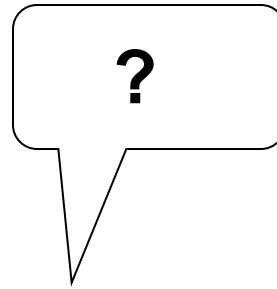
# **Getting Team Cohesion in Proposal Orals (or) Does Your Orals Team Come Across as Stumblebums or Winners?**

Presenter: Tom Leech, Orals Coach

Winning Presentations



# Recall what these chaps said? (i.e., about teamwork)



- **3 Musketeers**
- **Ben Franklin**
- **Henry V**

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# Given: Orals performance is a measure of contract performance



**Stumblebums – lost**

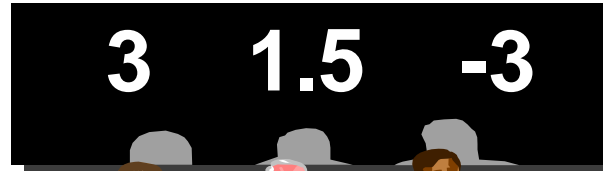
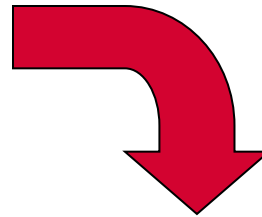


**Cohesive teams - won**

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# Review Boards like a cohesive team



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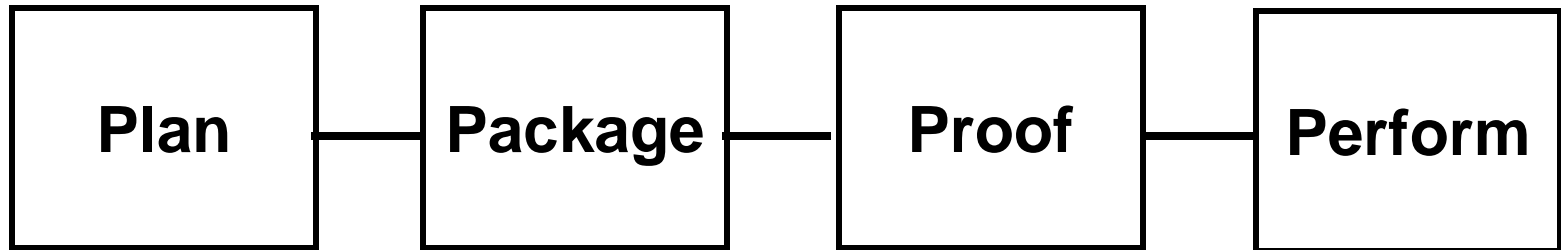
# Many conditions interfere with cohesion

- Companies may have not worked together
- Key people have not worked together
- People located in multi places
- Differing experience with customer
- Tight deadlines, time to prepare often tight
- Current work assignments prevent getting together

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# Objective today: Have your orals teams demonstrate cohesion

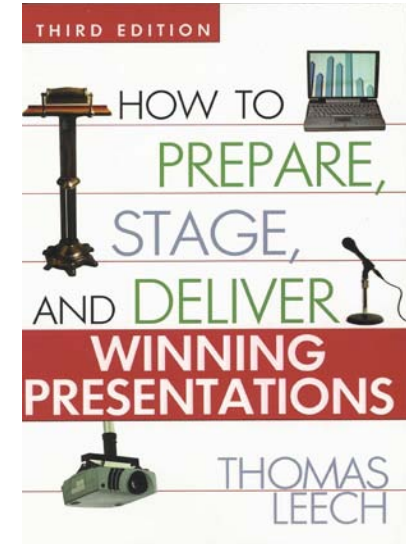


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# Why should we listen to this speaker?

- Started with GD Business Development, Engineering
- Has coached 250+ teams prepare for orals (% wins high)
- Conducts upfront orals seminars
- Coached many sample tasks
- Conducts skill-build seminars

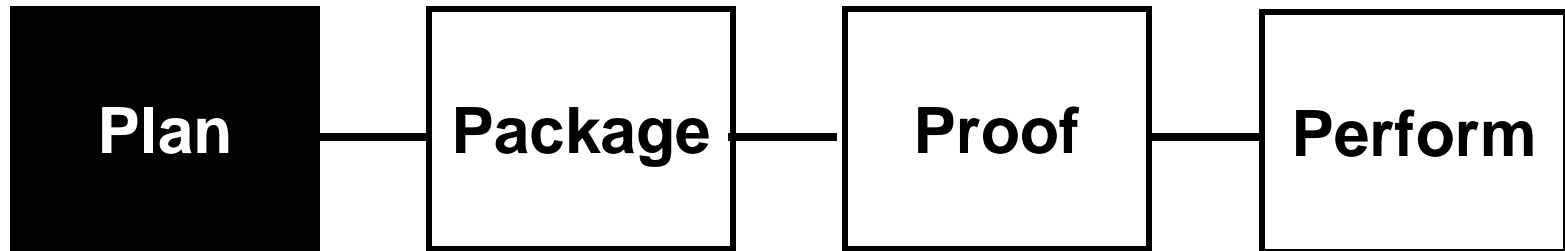


**“Top of the class.”**  
**Presentations Magazine**

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# Objective today: Have your orals teams demonstrate cohesion



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# Choose team carefully

- PM as team builder
- Key personnel with mutual experience (if possible)
- Knowledgable presenter support

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# Key player – team program director

- Need good team leader
- Understand multiple roles
- Accept help to relieve load
- Make teambuilding a priority
- Lead prep time & show time

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# Get them onboard, together

- Set workable schedule
- Start with early training seminar
- Exchange technology & processes knowledge
- Share customer insights
- Surface joint understanding and lack of same

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# Share marketing strategy

- Basis - the RFP
- Customer needs, hot buttons
- Competitor sizeups

- Counters & ghosts
- Discriminators
- Win themes

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# Alert -- Sample problems mean extra care

- Assigned scenarios
- Test of fast reaction times, under pressure
- Likely close-to-reality simulation
- Can add or subtract from formal presentation (and score)

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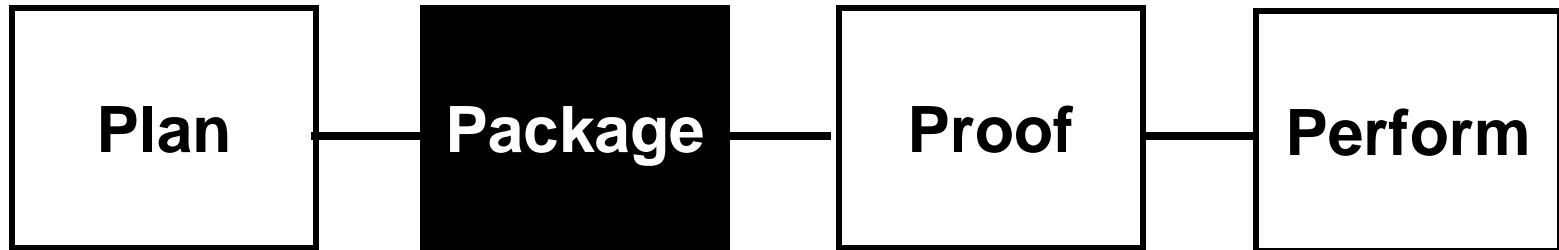
# Alert -- Sample problems major test of teamwork

- New process for many members
- Chaos common outcome
- Success tips vital to set process
- Try-outs develop team and success

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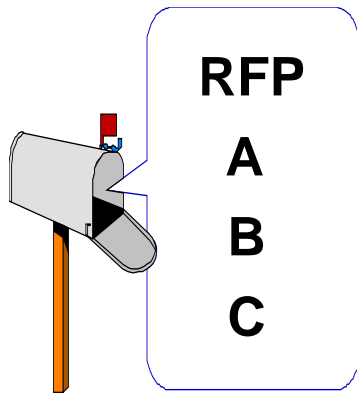


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# Make sure all understand and buy into rules (customer's and ours)

- Follow RFP requirements
- Know scoring criteria
- Set section time targets (1<sup>st</sup> cut)



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# Strive for organizational clarity and consistency

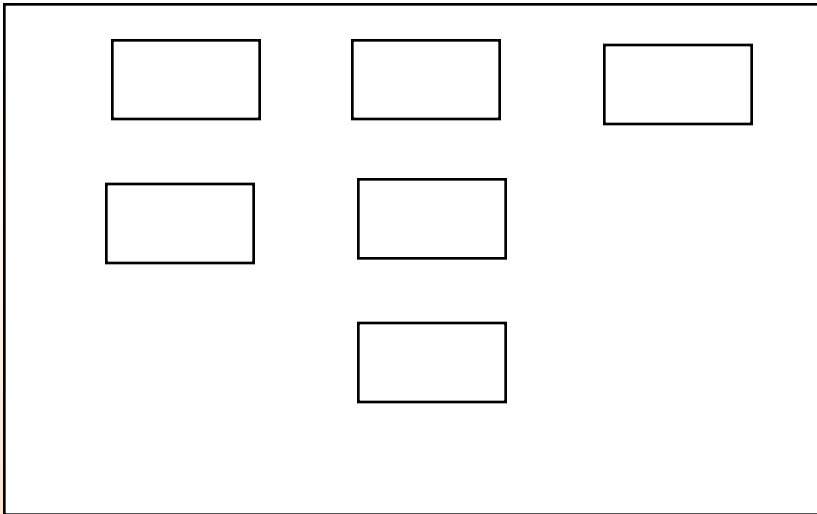
- Openings that follow same style
- Win themes reinforced
- Outlines to develop message clarity
- Storyboards to compare visual styles
- Delivery scripts to focus key info

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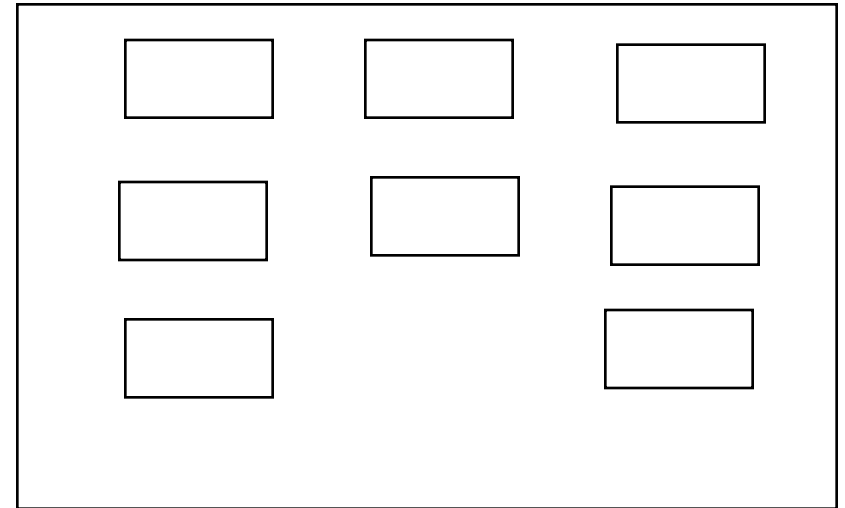


# Storyboards invaluable for cross-communication

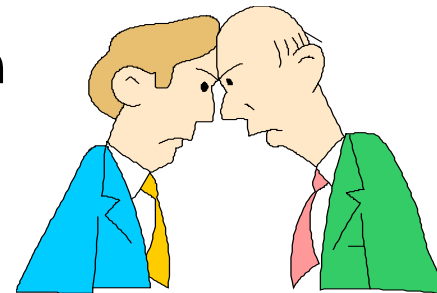
## Section 1



## Section 2



**Communication  
in  
progress**



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# Use road signs to help audience track segments

## PLAN X ADDS QUALITY

- Overview Helen
- Problem analysis Pete
- Trade studies Manny
- Plan X Solution Helen

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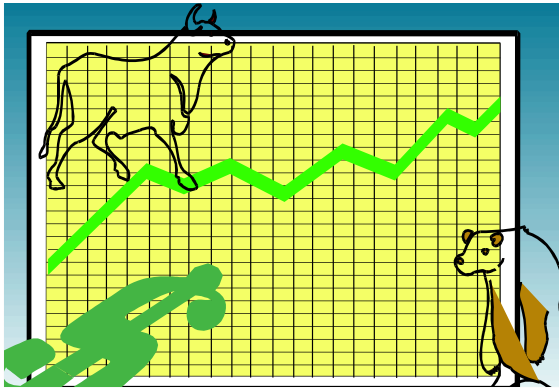
# Look for ways for speakers to show cohesion

- Here's where we've worked together
- Here's where we've worked with you
- Been there, done that stories
- Recognition of successes

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# Develop graphics for team look

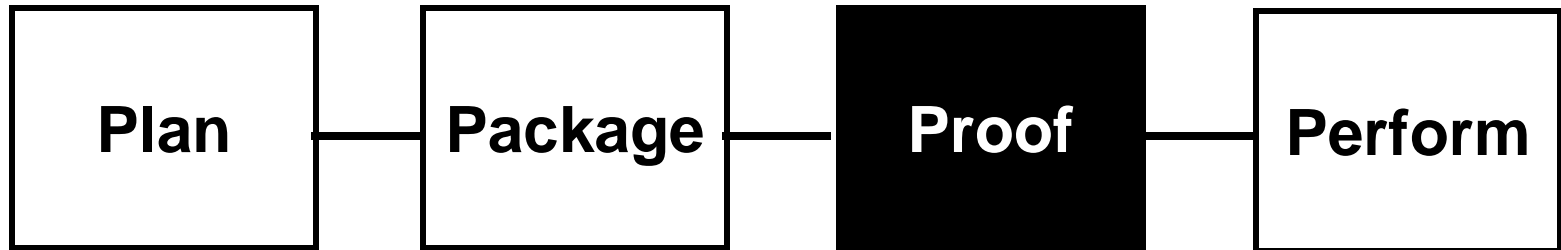


- Same format (per template)
- Matching styles
- Fit to likely audience
- Point person to maintain quality & consistency
- Reviews to keep tuning

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# Objective today: Have your orals teams demonstrate cohesion



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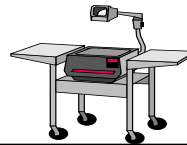
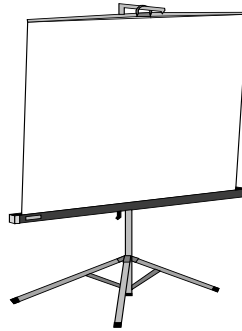
# Communicate orals setup

Our team

○

○

○

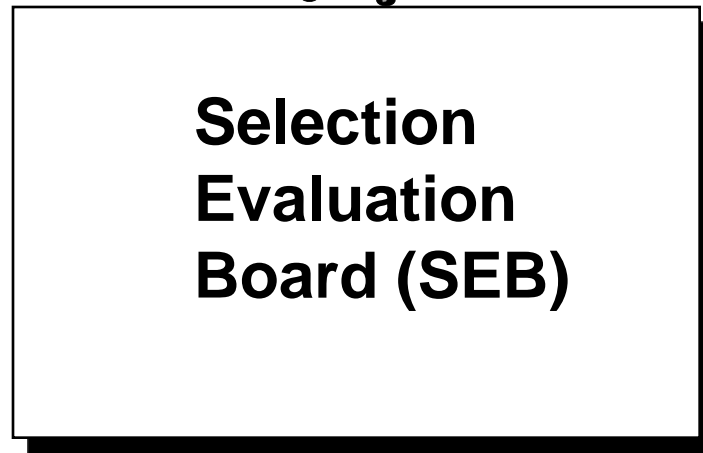


○?

○?

○?

○?



X

X

X

X

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# Make sure all know the gear

- Whose equipment?
- Set up when?
- Slide control
- Screen, pointer operation
- Backups?

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# Practice, and practice, essential (and often short-changed)

- Make it mandatory
- Not murder board
- All observe and help other speakers
- Must meet time targets
- Q&A prep vital

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# Get them ready for show time – as a team

- Wardrobe
- Arrival & setup
- Room layout, gear, speaker positioning
- Review Board engagement and interaction
- Speaker transitions
- Time tracking and control

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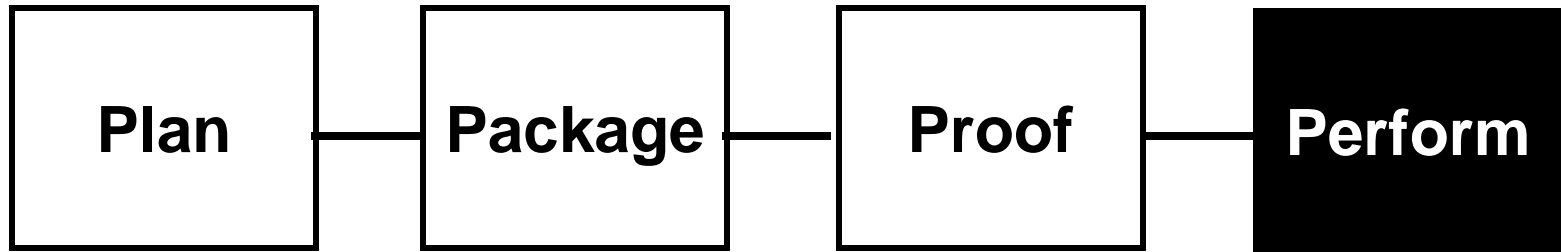
# Keep teambuilding a priority

- Special event, dinner to unwind
- Awards, fun
- Relieve pressure

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# Objective today: Have your orals teams demonstrate cohesion



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# Look and perform like a team

- PM leadership
- Speaker transitions
- Talk team
  - Where worked before
  - How work together ahead
  - Follow time targets

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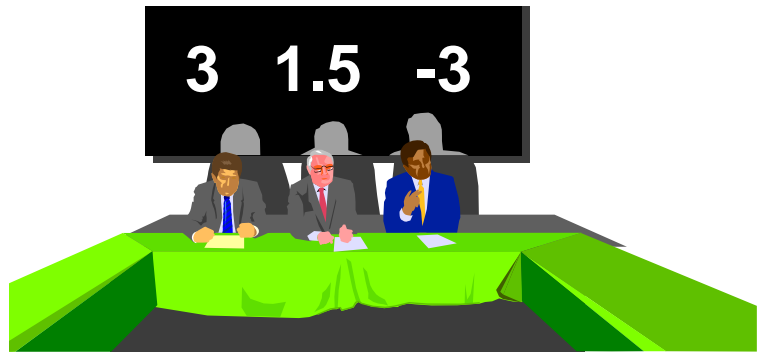
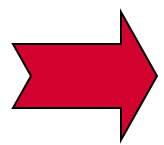
# Must work together in Q&A

- PM is fielder and conductor
- All onboard and ready to support
- Make sure all follow the game plan

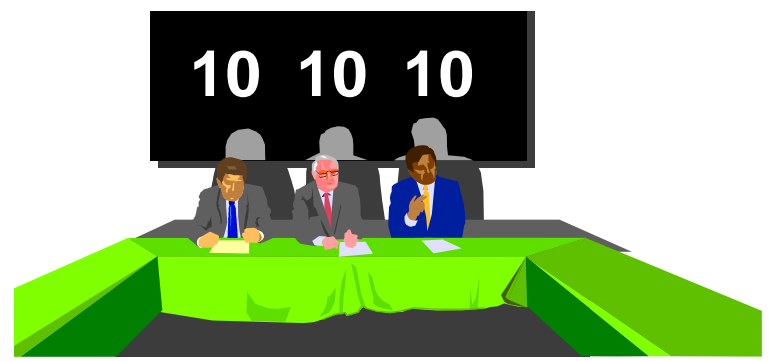
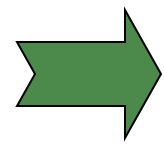
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# So - which team do you want to show up?



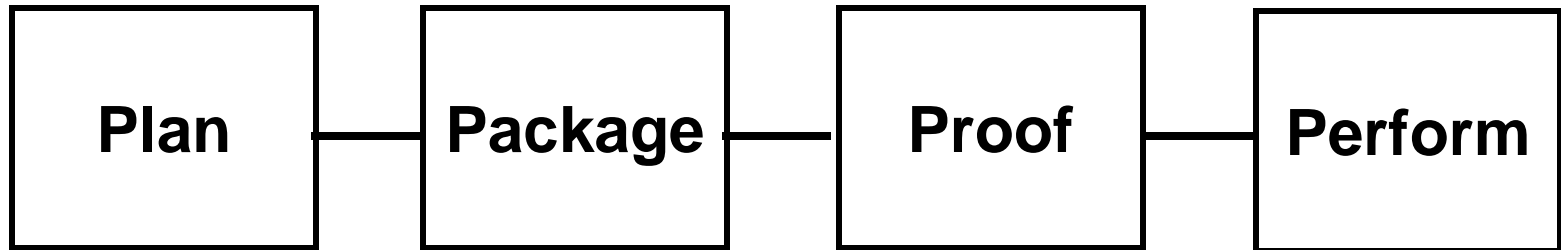
OR



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# Make it happen with diligent attention to the Four P's



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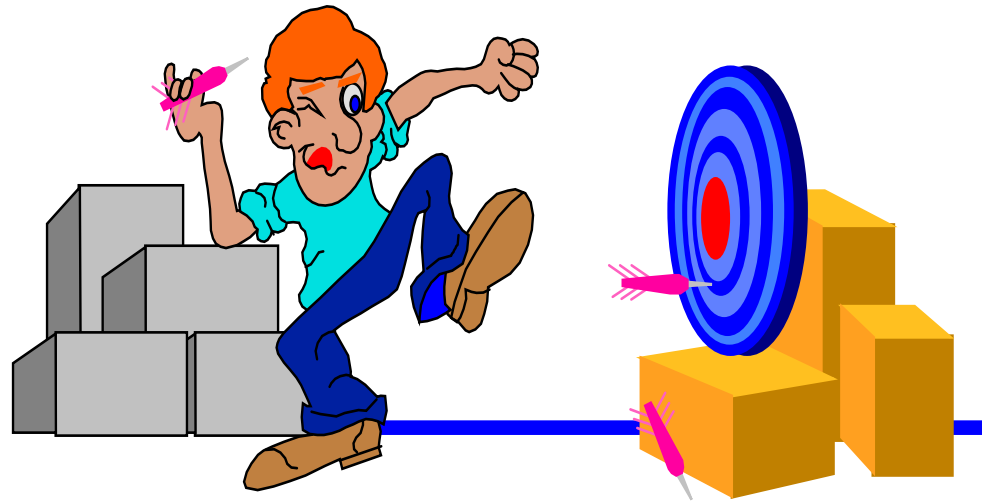
**To conclude:**

**Cohesion is good --  
Make it happen**

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# Questions? Comments? Challenges?



**And feedback form please**

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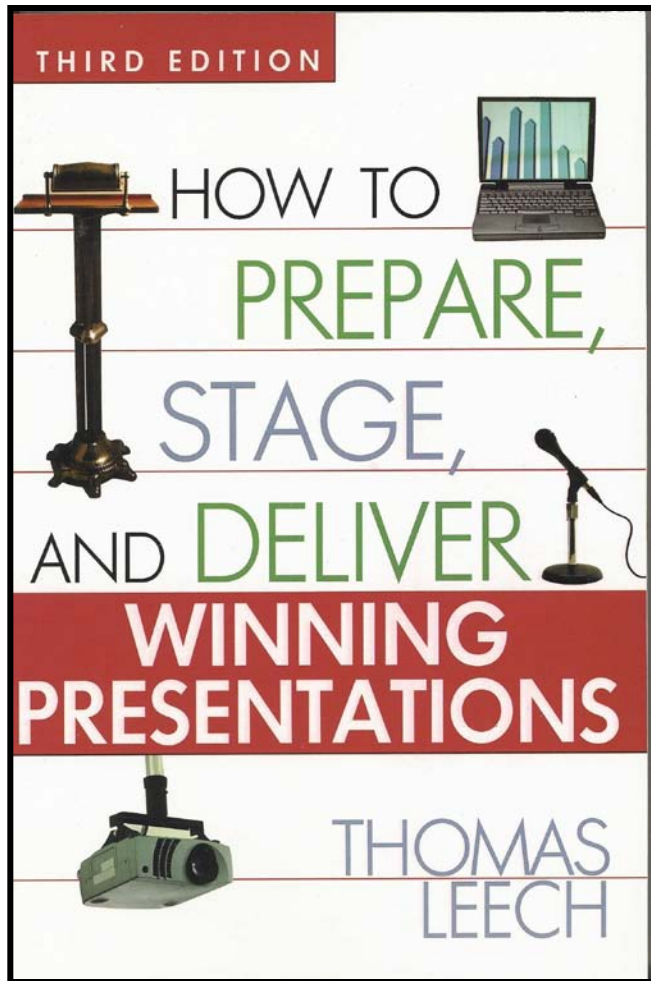
**November 11-12, San Diego, CA**

**Check website for specifics**

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