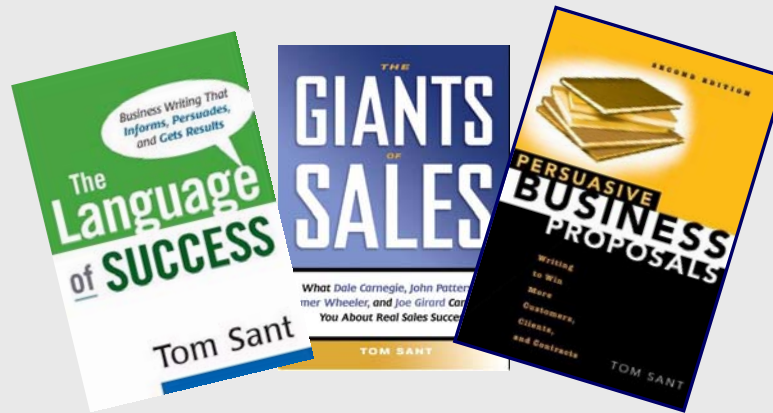

Bridging the Gap

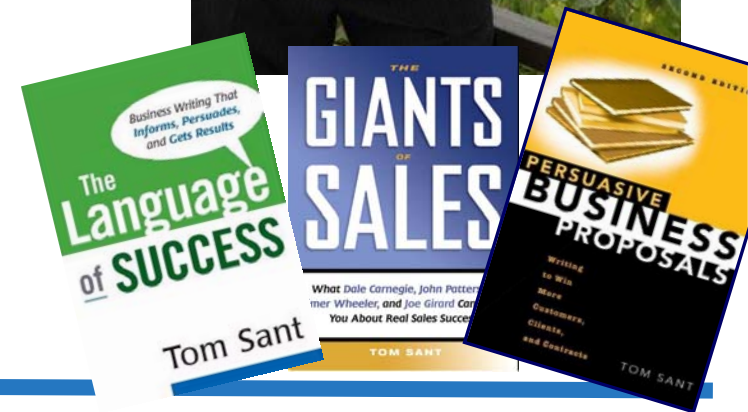
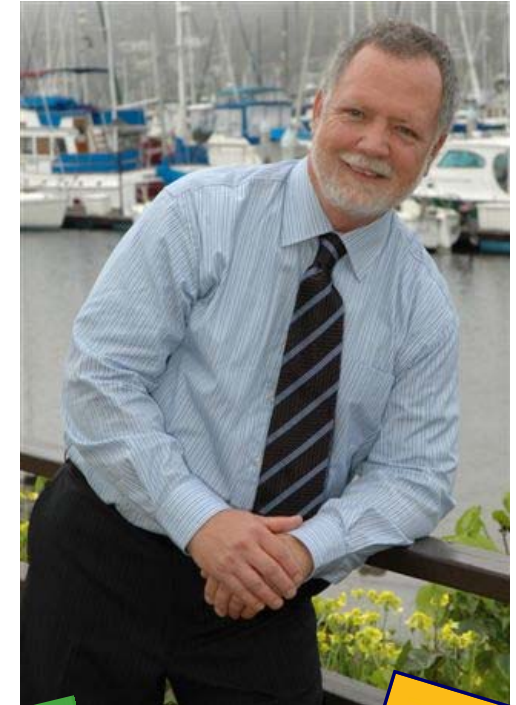


Coaching Technical Contributors to Write Persuasively

Dr. Tom Sant
Hyde Park Partners
San Luis Obispo, CA

Your Presenter

- Dr. Tom Sant, founder of The Sant Corporation
- Author of:
 - **Persuasive Business Proposals**, the world's largest selling book on proposal writing (2nd edition, 2004)
 - **The Giants of Sales**, named one of the top 3 business books of 2006 by the Bloomberg network
 - **The Language of Success** (published January 31, 2008)
- “America’s foremost expert on proposal writing.”
(American Management Association)
- “One of world’s top ten sales trainers.”
(Selling Power Magazine)
- Creator of the world’s most widely used proposal automation system
- Over 25 years’ experience with Fortune 500 companies
- Over \$35 billion in winning proposals



Agenda

Mind the gap!

The starting point

- What is persuasion?
- When does it happen?
- How can we help our technical experts write persuasively?

Working with subject matter experts

- Common problems
- Eliminating Guff and Geek
- Patterns for typical kinds of content: *Solutions, Product/Service Details, Case Studies, RFP Answers*

Suggestions for closing the gap



MIND THE GAP

Defining the problem

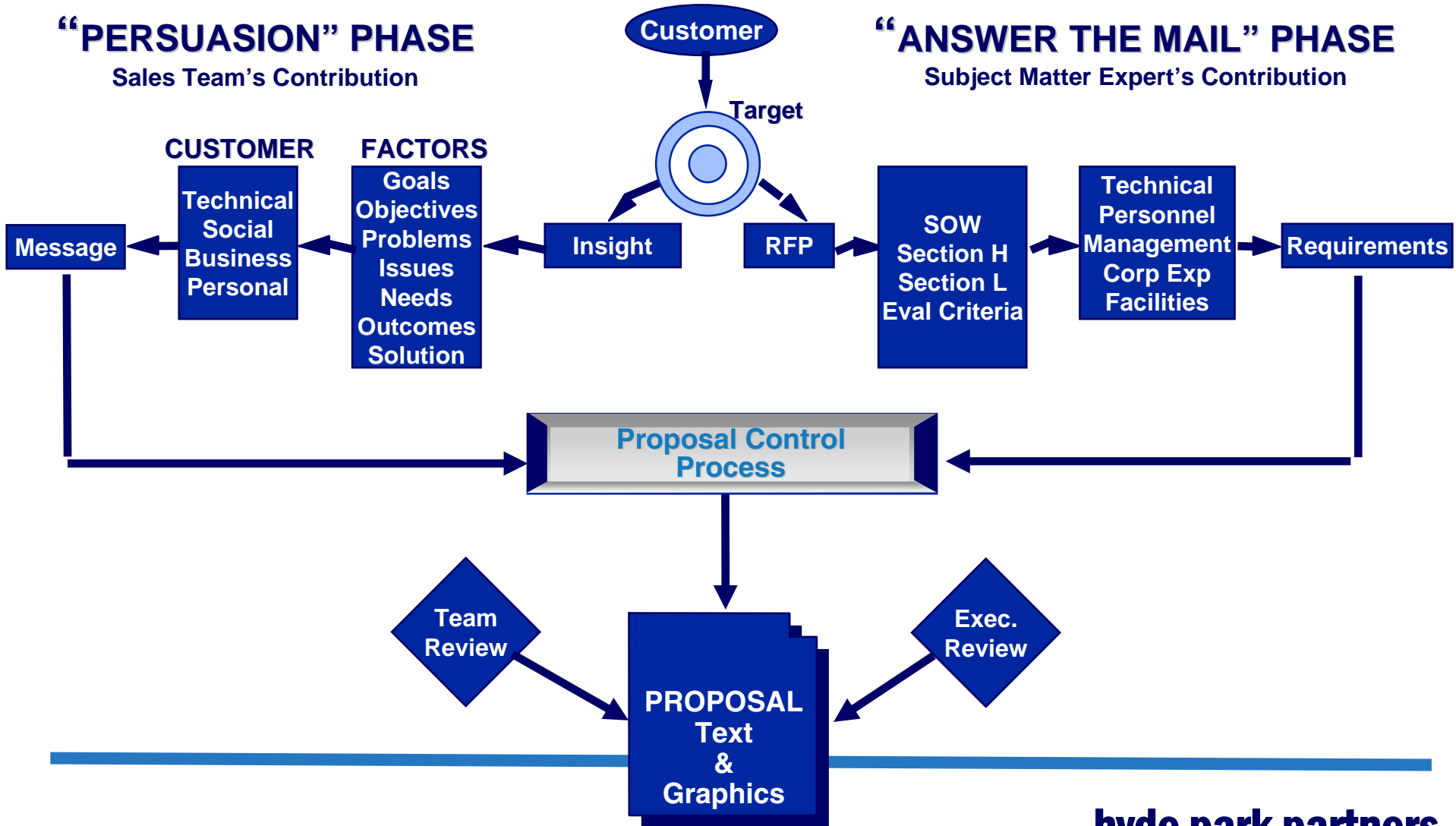
FORMAL PROPOSAL DEVELOPMENT PROCESS

“PERSUASION” PHASE

Sales Team’s Contribution

“ANSWER THE MAIL” PHASE

Subject Matter Expert’s Contribution



Effective
proposal
management

Insight into
the
opportunity

Subject
matter
expertise





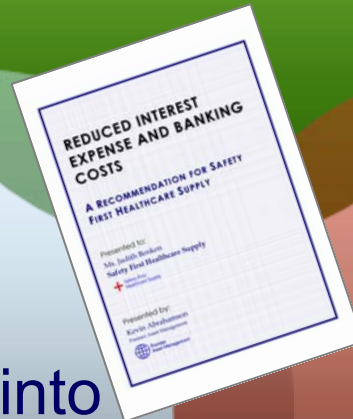
So Who Are These People We Depend On?



Effective
proposal
management

Insight into
the
opportunity

Subject
matter
expertise



Symptoms of Gap Syndrome

SME Gaps:

1. Slow or no response to requests
2. Text that is
 - ❖ Too technical
 - ❖ Not customer focused
 - ❖ Poorly written
 - ❖ Out of date

Sales Force Gaps:

1. RFPs that appear “suddenly”
2. Requests for
 - ❖ “The standard...”
 - ❖ “A price quote...”
 - ❖ “The same as last time...”
3. Cover letters and executive summaries that make no sense

Is It Worth Trying to Bridge the Gap?



The Starting Point



What's in a Title?

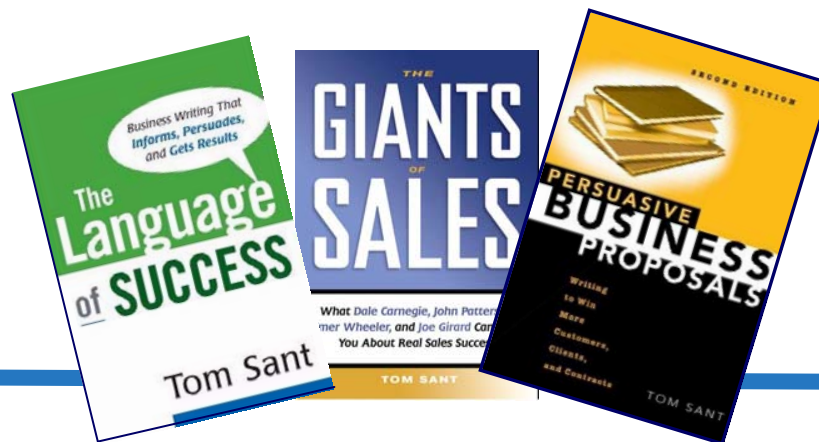
“Creating Persuasive Proposal Content.”

Which word is the most
problematic?

Persuasive.

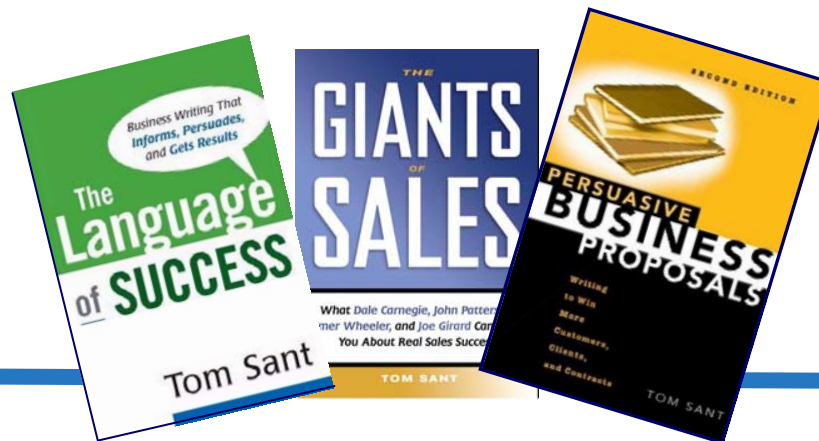
Three Questions

1. What is persuasion?
2. When does it happen?
3. How can we help our technical experts more effective in contributing to winning proposals?



First Question...

1. What is persuasion?



This is not persuasion...



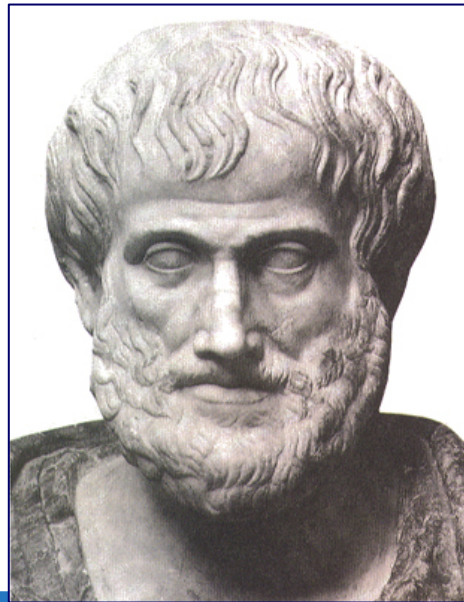
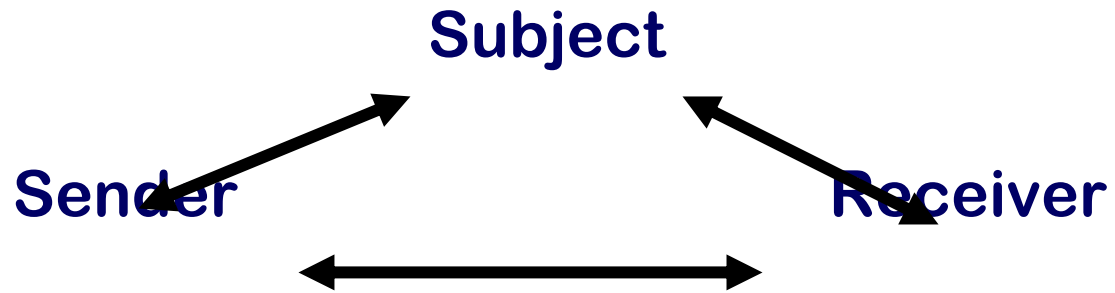


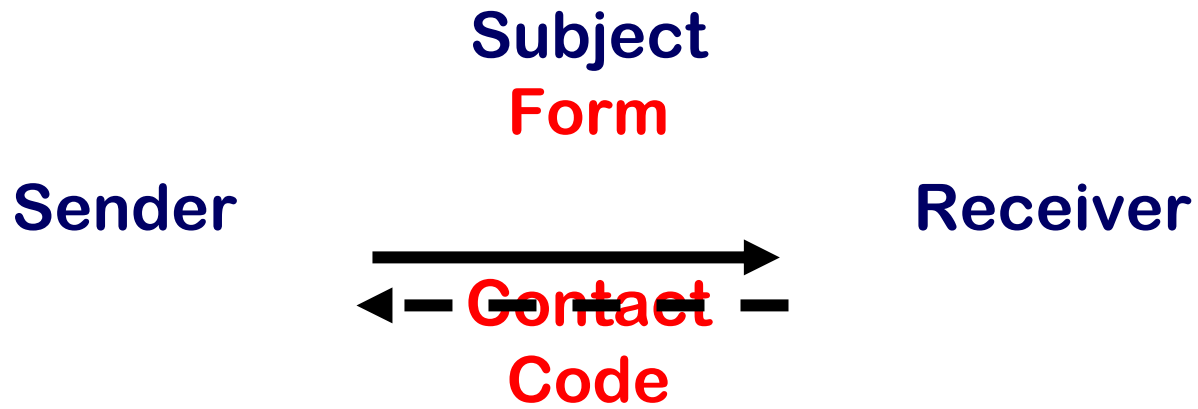
Pretty pictures? Fancy words?

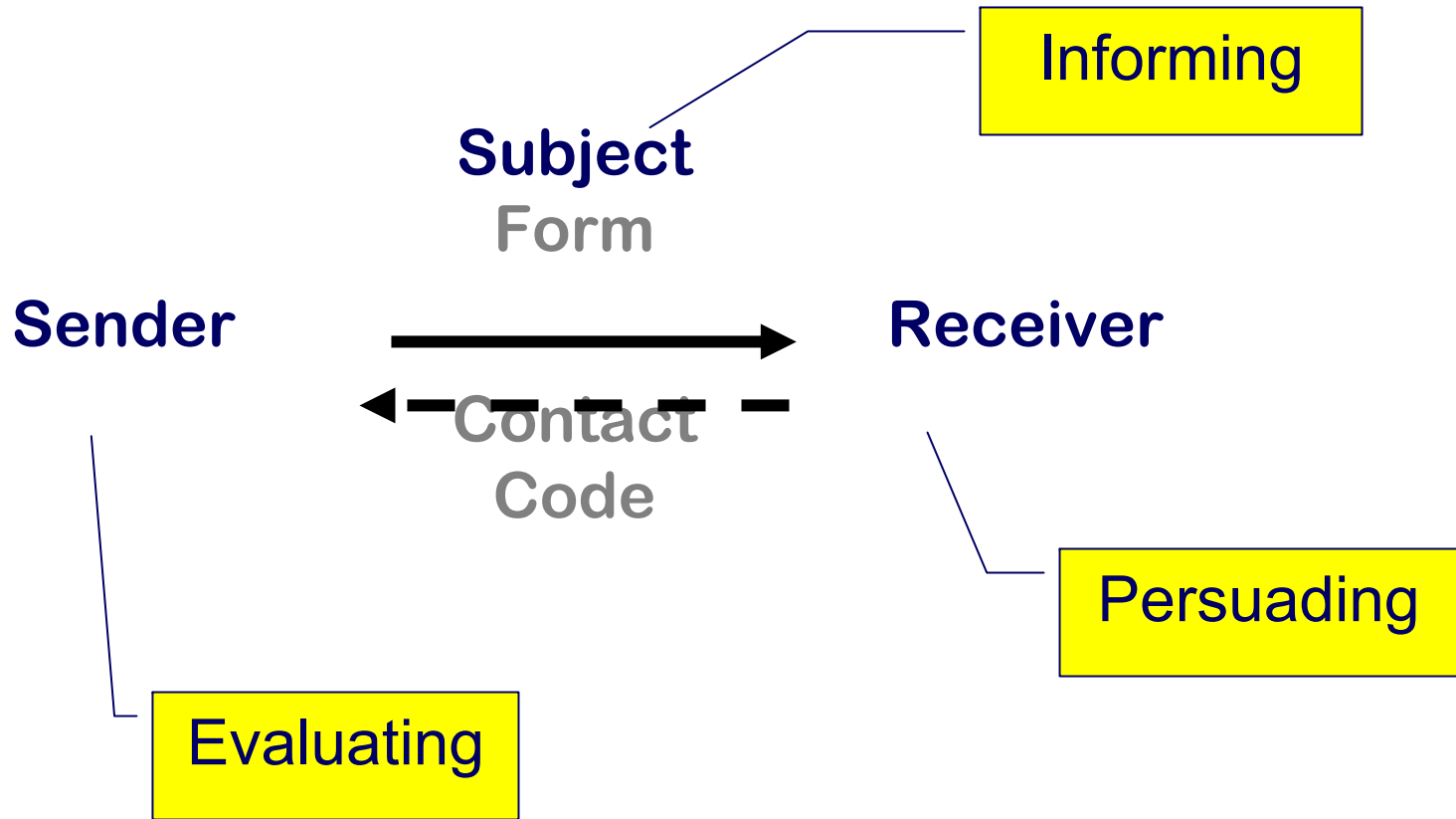


Persuasion
is a form of
communication.

So maybe a little
communication theory
is a good place to start.









So...

One answer to the question,
What is persuasion?,
is this:

A form of communication for which the controlling
element is the
audience.



Persuasion
is
client-centered
communication.

Hence, the Cicero Principle



“If you wish to persuade me, you must think my thoughts, feel my feelings, and speak my words.”

--Cicero

Cicero's Three Points

**Audience Level
of Expertise**
(Speak my words)

- Expert
 - Highly informed
 - Acquainted
 - Uninformed
-

**Audience
Personality Type**
(Think my thoughts)

- Analytical
 - Pragmatic
 - Consensus-seeker
 - Visionary
-

Audience Role
(Feel my feelings)

- Check signer
- User
- Gatekeeper

The fallacy of the familiar

	Information	Evaluation	Persuasion
Expert	Comfort Zone		
Highly informed			
Somewhat informed			
Lay			

Moving to the persuasion zone

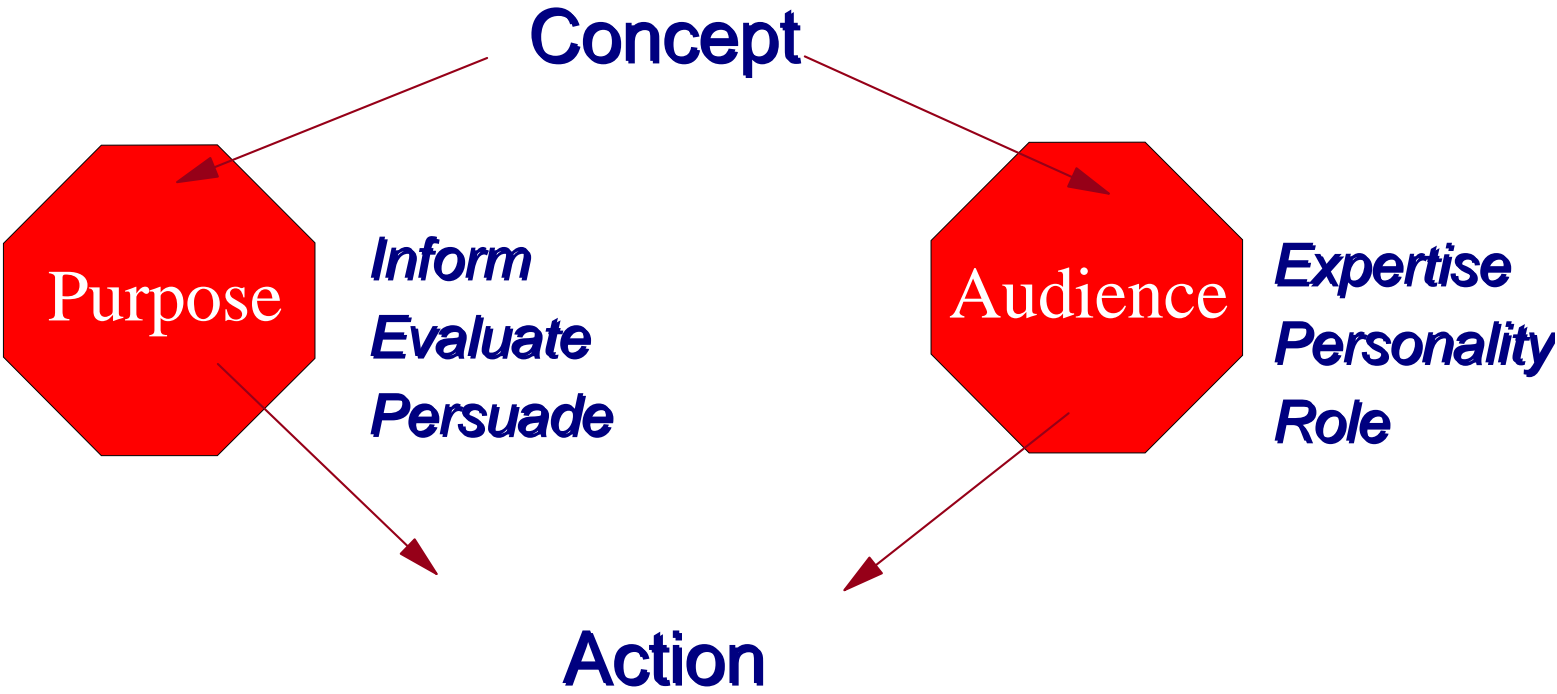
	Information	Evaluation	Persuasion
Expert	Comfort Zone		
Highly informed			
Somewhat informed			Persuasion Zone
Lay			



But there's another element:

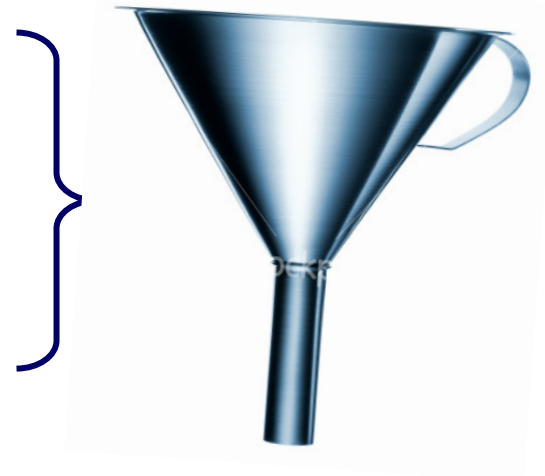
Purpose.

Why do we write
when we write to inform, to evaluate,
and to persuade?



Informing

- Purpose: clear transfer of data
- Factual orientation—no opinions, nothing subjective
- Emphasis on accuracy, completeness
- Structural metaphor: the Funnel
 - Lead with most important fact
 - All subsequent facts in order of priority to the audience



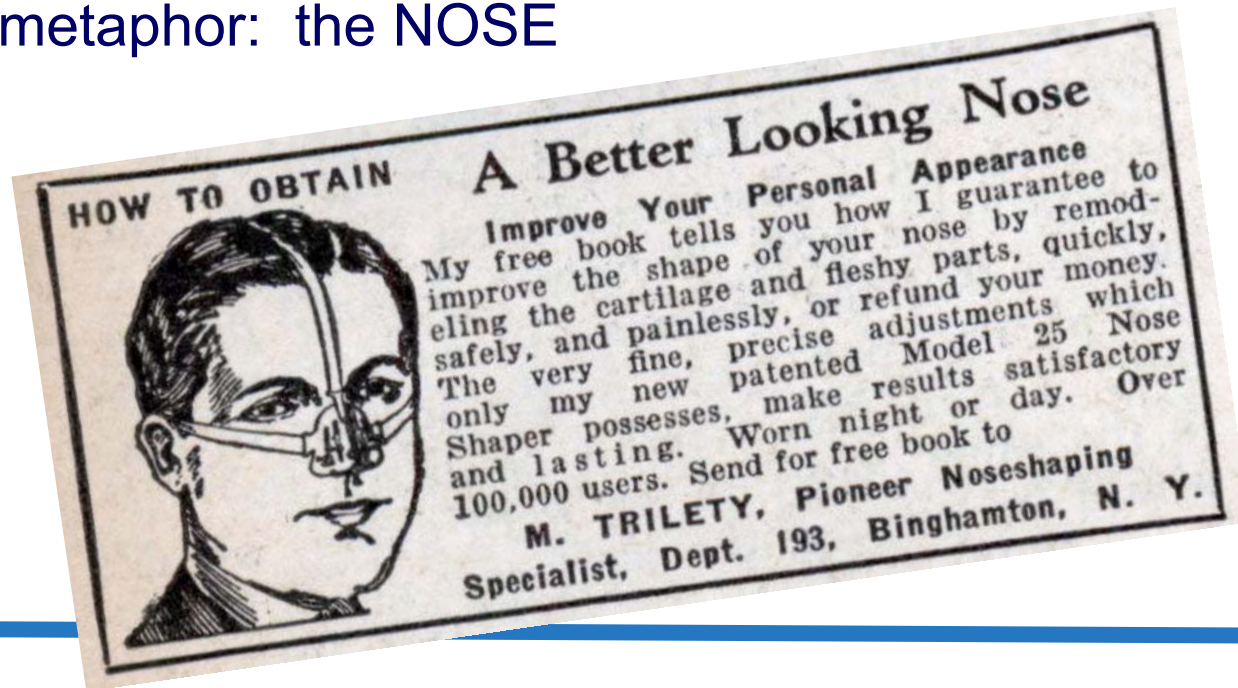
Evaluating

- Purpose: expressing a judgment
- Focus on expertise, opinion
- Emphasis on process of analyzing evidence and reaching conclusions
- Structural metaphor: the “Burger”
 - Define the topic, its relevance, and your criteria of judgment
 - Meat = specific observations
 - Close with conclusion, final opinion, action steps



Persuading

- Purpose: motivating the audience to change in what they think, feel or do
- Focus on influencing beliefs, attitudes
- Emphasis on the decision making process
- Structural metaphor: the NOSE




The Principle of Persuasive Structure

The Persuasive Paradigm



**Hitting it
on the
N-O-S-E**

- Needs:** Demonstrate an understanding of the customer's key business needs or issues
- Outcomes:** Identify meaningful outcomes or results from meeting those needs
- Solution:** Recommend a specific solution
- Evidence:** Build credibility by providing substantiating details



Persuasion
is
client-centered
communication
structured *to affect*
the way the audience thinks,
how they feel,
or what they do.

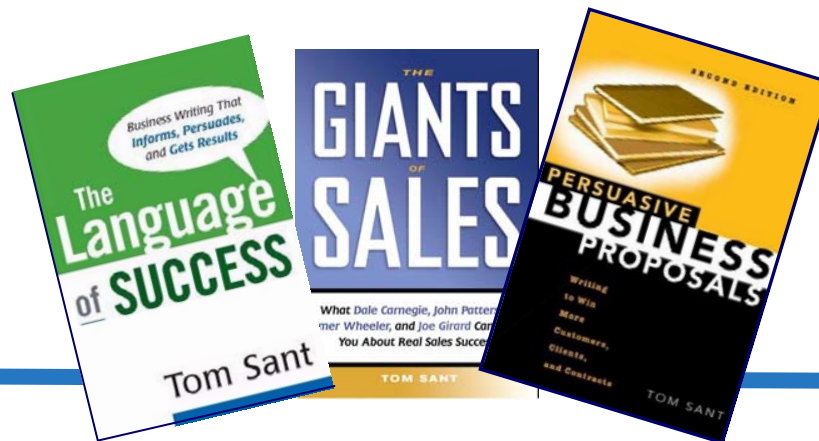
Structure is the Secret

Your goal:

- ✓ Present the right information
- ✓ Present it in the right order
- ✓ Create the right impression

Persuasion as a Process

1. What is persuasion?
2. When does it happen?



When the Decision Maker Sees...

Relevance

to the business situation and the potential for real

Value,

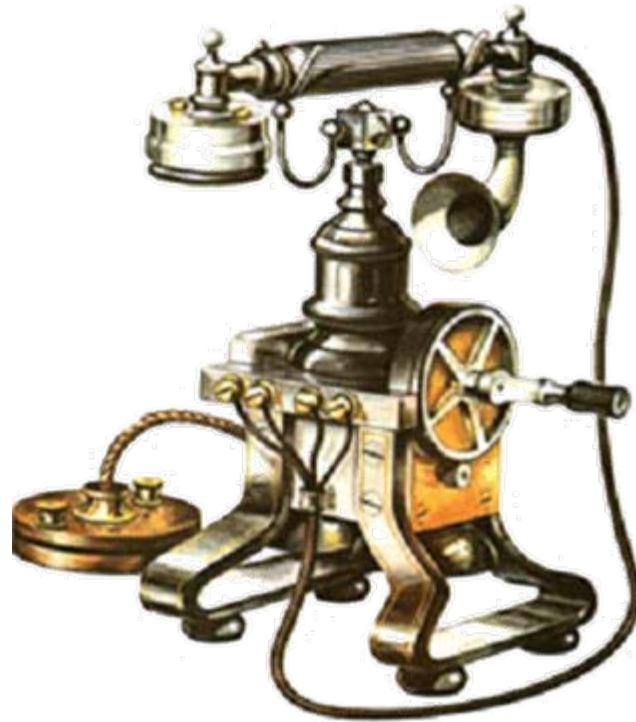
linked to

Differentiators

and supported by

Proof.

Without Value, Even the Best Technical Proposals Struggle



Value!

$$(\text{Value}_s - \text{Cost}_s) > (\text{Value}_a - \text{Cost}_a)$$

where:

Value_s = the value of your solution

Cost_s = the cost of your solution

Value_a = the value of the next best alternative

Cost_a = the cost of the next best alternative

Differentiators?



Seven Key Questions

1. Client's problem, issues?
2. Why is it a problem?
3. Desired outcomes?
4. Most important?
5. Potential solutions?
6. Probable results?
7. Why are we the right choice?



Common Pitfalls

1. Defining the customer's need as being identical to your solution.
2. Failing to push your analysis hard enough.
3. Assuming the RFP defines the business problem or need completely
4. Not talking to enough of the client management team.

Language Alert!

Watch out for...

Fluff

*Technical experts and other SMEs sometimes confuse
FLUFF with real value.*

Fluff





Fluff:

1. Clichés
2. Grandiose claims
3. Vague generalities
4. No evidence
5. Lack of relevance or specificity

Forget the Fluff!

Here are a few examples....

Anything look familiar?

Best of breed

World class

Leading edge

State of the art

Quality focused

Uniquely qualified

Innovative

High performance

Synergy

User friendly

Proven

Partnership

Seamless

Robust



Thank you for allowing us to submit our response to your RFP.

As you may know, Wilcox DataFlex is uniquely qualified to deliver world-class results for every customer. We offer best-of-breed products and customer-focused service to produce seamless, high availability solutions. Our commitment to partnering with our customers produces innovative yet user-friendly applications.

I look forward to discussing our applications with you to see if there's a good fit. In the meantime, if you have any questions, please feel free to call.

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More Fluff...

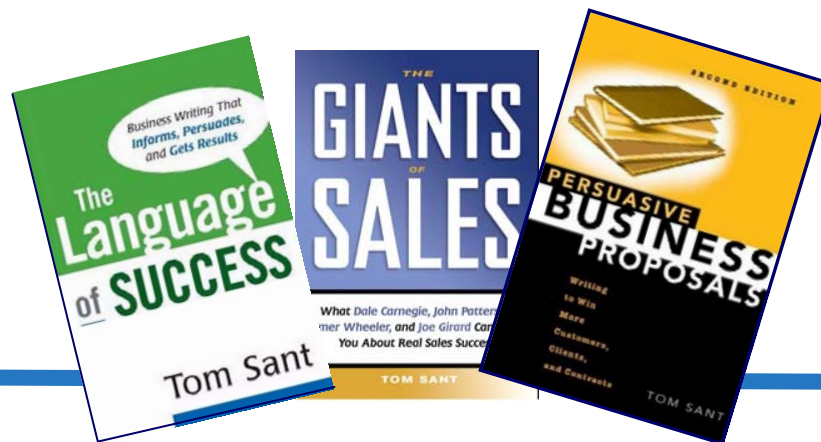
Helping you grow and expand your debit card program, increase card activation and bring XYZ Bank cards to top of wallet, Abecedarian's X*lence Rewards platform will allow XYZ Bank to reward customers for their entire relationship with the bank. A compelling program with a very attractive return on investment, X*lence is designed to reward customer loyalty and card use to bolster that relationship, decrease attrition and increase card usage for switching to and staying with XYZ Bank!

Still More Fluff...

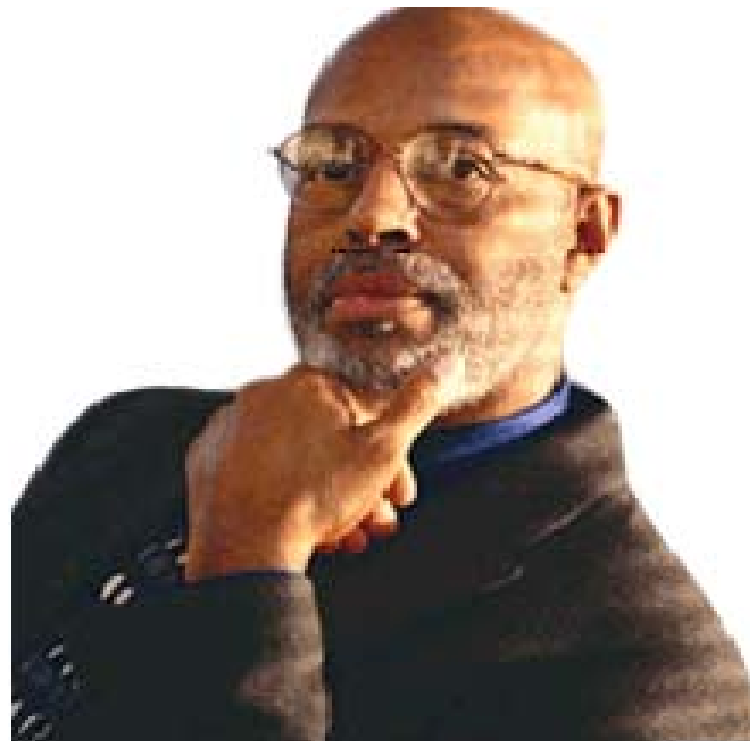
Our firm has a world class capability to deliver application packaging services to clients. These services have been provided to major organizations with the detailed knowledge of packaging techniques and technologies that only such a wealth of experience provides. We have a proven and referenceable track record of delivering these services to organizations worldwide for multiple environments.

The Big Question

1. What is persuasion?
2. When does it happen?
3. How can we help our technical experts more effective in contributing to winning proposals?



Bridging the Gap with Subject Matter Experts



What Do You Need from Your SMEs?

FAQ
responses

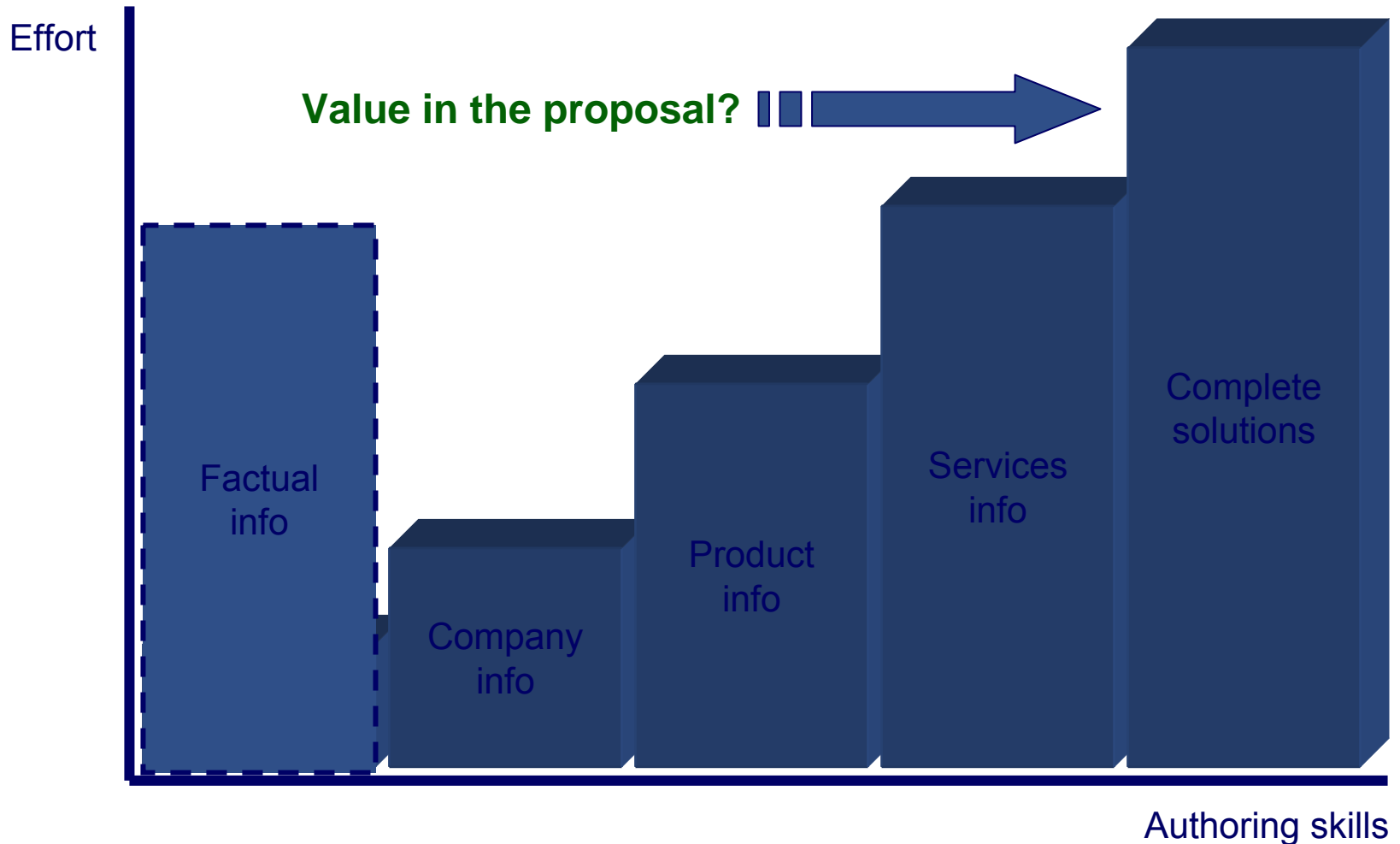
Reusable solution
components

Third-party
metrics

Case
studies

RFP
answers

How Hard Is It?



Getting SME Cooperation

In an ideal world...

- No information is out of date
- SMEs are all eager to contribute
- Content is
 - Client-centered
 - Readable and interesting
 - Ready on time
 - Perfectly formatted
 - Proactively updated

That's the Perfect World

But how about the world
we actually live and work in?



More Typical...

“That’s not my job.”

“Sorry, but I’m on a billable project...”

“Why on earth would you want that information?”

“I’ll get it to you next Tuesday, for sure...”

“...[silence]...”

Common Problems with Technical Content

1. Creating a bill of materials or a technical specification instead of a persuasive solution recommendation.
2. Over-designing the solution.
3. Making too many assumptions and leaving out key information—no orientation to the audience.
4. Not tying the solution to the needs and outcomes—technical focus instead of functional.
5. Not making the information easy to understand.
6. Perfunctory responses to RFP questions.

An RFP Q&A Example

Question: *Do you provide electronic billing?*

Answer: Yes, we provide electronic billing.

Can you help your technical contributor
do better?

Another RFP Q&A Example

Question: *Explain the process to change a deposit account from one account type to another.*

Answer: The core system has the functionality to change type and reproduce signature cards for the new account.

Does this even answer the question?

And When You Get It, Expect a Lot of...

Guff

and

Geek

Guff.







Guff.

Guff:

1. Long sentences
2. Too many big words
3. Too much passive voice



The dimensionality of expected project problems coupled with the limited time available for preparation means that choices will have to be made to assure viability of the most critical analytical processes. Thus, a leveraging of problem similarities and process relationships to allow for sharing of resources and solutions, will be needed to contain cost and staff expenditures and assure maximum payoff from effected solutions.



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– **Average sentence length: 32 words**

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- **Average sentence length: 32 words**
- **Words with three syllables or more: 18**

•

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- **Average sentence length: 32 words**
- **Words with three syllables or more: 18**
- **Passive voice: both sentences**

More Guff...


A leveraging of problem similarities and process relationships to allow sharing of resources and solutions, will be needed to contain cost and staff expenditures and assure maximum payoff from effected solutions.





Geek:

1. Disregard for the audience
2. Overuse of jargon and acronyms
3. Too many assumptions
4. A focus on technical details instead of functions or differentiators



This approach coalesces the capabilities of multiple corporate technology solutions providers that specialize in systems integration, client/server development, Internet/Intranet information systems, and information security.

Some examples

The Commercial WebBanking full-featured wire module includes a simplified menu structure, the ability to support Domestic and International Repetitive and Free-Form Wire requests, Bank and Customer Maintained Wire Templates, Quick Entry of Repetitive Wires and optional security code validation and effective date entry.

Overuse of Product Names and In-House Jargon

MCI's Digital Data Service (DDS), a full duplex digital private line service, provides your company with MCI's highest performing and most reliable 2.4, 4.8, 9.6, and 56 Kbps circuits to support its most critical data applications. MCI DDS supports point-to-point and multipoint applications, including:

1. Mission Critical Data Transfer
2. LAN/MAN/WAN Interconnection
3. Distributed Data Processing
4. Limited Motion Narrow Band Video
5. On-Line, Interactive Data Base Access
6. Remote Location Access
7. Access to MCI Packet Technologies

MCI DDS is provisioned exclusively on MCI's DDN, a highly redundant MCI subnetwork that exceeds performance and reliability objectives.

Overuse of Product Names and In-House Jargon

Simpson Security will furnish and install the Access Control Systems at your office building in New York City. The Software House CCure 800 Access Control Head End Hardware and Software will be the heart of the system. The panel for this location will connect to the new software head end located within your facility. In the event that you decide to connect remote sites to your location, the system will be designed for easy access into your existing network. In the initial design we have assumed that the host computer will be located Security Console. Simpson will install access control panels, card readers, and alarm contacts for granting or denying access into the existing three doors in your facility. In addition Simpson will install Card Readers on the existing sliding gates and turnstiles. Each of the access points will have a card reader and contact for access into the facility as well as door status. The purpose of the system is to determine who is allowed into the facility at any given time and to keep accurate records of all access or alarm activity. The host system will be located in the Security, with additional workstations located at the front desk and loading dock. The owner will be responsible for providing IP addresses at each of the workstation locations.

Overuse of Product Names and In-House Jargon

Simpson Security will furnish and install the **Access Control Systems** at your office building in New York City. The **Software House CCure 800 Access Control Head End Hardware and Software** will be the heart of the system. The panel for this location will connect to the new **software head end** located within your facility. In the event that you decide to connect remote sites to your location, the system will be designed for easy access into your existing network. In the initial design we have assumed that the host computer **will be located Security Console**. Simpson will install access **control panels, card readers, and alarm contacts** for granting or denying access into the existing three doors in your facility. In addition Simpson will install Card Readers on the existing sliding gates and turnstiles. Each of the access points will have a card reader and contact for access into the facility as well as **door status**. The purpose of the system is to determine who is allowed into the facility at any given time and to keep accurate records of all access or alarm activity. The host system will be located **in the Security**, with additional workstations located at the front desk and loading dock. The owner will be responsible for providing **IP addresses** at each of the workstation locations.

Reading acronyms...

This organization has been privileged to partner with the Defense Intelligence Agency (DIA) Directorate for Information Management and Chief Information Officer (DS) and the Joint Intelligence Task Force Combating Terrorism (JITF-CT) in the establishment of an information technology (IT) infrastructure that meets Department of Defense Intelligence Information Systems (DoDIIS) enterprise objectives and JITF-CT mission requirements.

Over the past five years we have had the opportunity to establish mission critical IT programs for JITF-CT, including the Combating Terrorism Knowledge Base (CTKB and CTKB-S), which provides a secure, accredited system to disseminate CT-related threat and warning, finished intelligence, and operational support information for Department of Defense (DoD) organizations, the Virtual Intelligence Production Enterprise Repository (VIPER), which supports JITF-CT business process automation and analytic research through the integration of advanced technologies, and the expansion of the Combined Theatre – Analyst Vetted Relational System (CT-AVRS) to support Combatant Command (COCOM) and JITF-CT analytic and visualization needs.

Reading acronyms...like chewing on thumbtacks

This organization has been privileged to partner with the Defense Intelligence Agency (**DIA**) Directorate for Information Management and Chief Information Officer (**DS**) and the Joint Intelligence Task Force Combating Terrorism (**JITF-CT**) in the establishment of an information technology (**IT**) infrastructure that meets Department of Defense Intelligence Information Systems (**DoDIIS**) enterprise objectives and **JITF-CT** mission requirements.

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Guidelines

Provide technical writers and SMEs with forms to fill out and guidelines to follow when they write:

Solution overviews

Product descriptions

RFP answers/responses

Case studies

For Example,

Guidelines for a High-Level Solution Overview

1. Define the solution in a single sentence. What are we recommending? Avoid product names and jargon.
2. Explain what the product/service will *do* for the client. Focus on *function* and *business fit*.
3. Explain how we provide the solution in another sentence. Focus on *execution*. How do we do the work?
4. List two or three differentiators that separate our solution from the competition's. Why do these matter to the customer?
5. List three specific features of our solution. Next to each feature, identify the specific customer problem or need that the feature addresses. Name one customer who has benefitted from each feature.

For Example,

Guidelines for a Product or Service Description

Introduction

- Define/identify the subject
 - Simple overview based on functionality
 - No jargon
 - Watch your assumptions
 - Divide the product or process into parts/steps
- Link it to value
 - Why does it matter?
 - Key differentiators?
 - State the win theme

Detailed Product or Service Descriptions

Introduction

Part / Step 1

Part / Step 2

Part / Step 3

Part / Step 4

Part / Step 5

- Define the part or step
- State its function
- Describe it in detail

Detailed Product or Service Descriptions

Introduction

Part / Step 1

Part / Step 2

Part / Step 3

Part / Step 4

Part / Step 5

Conclusion

- Emphasize differentiators—ghost the competition
- Return to the win theme / value claim

Case Studies:

Great Success Stories are P-A-R for the course!

1. **P**roblem
2. **A**ction
3. **R**esults



RFP Answers

To write persuasive RFP answers:

- Edit canned material, especially if it comes from technical sources
- Use this pattern for important answers:
 - ❖ **Acknowledge:** Yes, this is an important issue.
 - ❖ **Persuade:** In fact, it's so important that we did something special about it.
 - ❖ **Substantiate:** Here are the details.

Two Ways of Saying the Same Thing

Question: What information appears on the Explanation of Benefits? Can EOB information be customized by the client? Please provide a sample EOB.

[Answer #1:]

See the enclosed EOB.

Generally all EOB messages are predefined for all clients to meet readability, accuracy and legal requirements. Limited customization is available, including the addition of logos and personalized remarks in the remarks area.

[Answer #2:]

It's important for plan members to understand how their benefits were determined. As a result, we use the Explanation of Benefits to provide clear communication and to avoid confusion or misunderstanding when plan members file a claim.

American Health has designed and written our EOB forms for maximum readability and accuracy. In addition, our forms' layout and content has been developed in part to address certain legal requirements. Within that framework, we can provide a limited amount of customization, such as adding your logo or providing personalized information in the remarks area of the form.

The enclosed EOB is a sample of what we will provide to your members.

Two Ways of Saying the Same Thing

Question: What information appears on the Explanation of Benefits? Can EOB information be customized by the client? Please provide a sample EOB.

Acknowledge



[Answer #2:]

It's important for plan members to understand how their benefits were determined. As a result, we use the Explanation of Benefits to provide clear communication and to avoid confusion or misunderstanding when plan members file a claim.

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Persuade

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Persuade

Substantiate

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MIND THE GAP

Closing the Gap

Courses of action to close the gap

Collaboration

Evangelism

Coercion

Gaining Collaboration

Emphasize the visibility of the bid

Make clear and simple requests

Prove the value of what they write to them and the firm

Minimize the work they need to do

Turn it around quickly

Provide stats on usage for reusable content

Practice the assumptive close

Evangelism...

The first principle of persuasive writing:

Be clear.

Live by the “first time right” rule.





Five ways to achieve clarity:

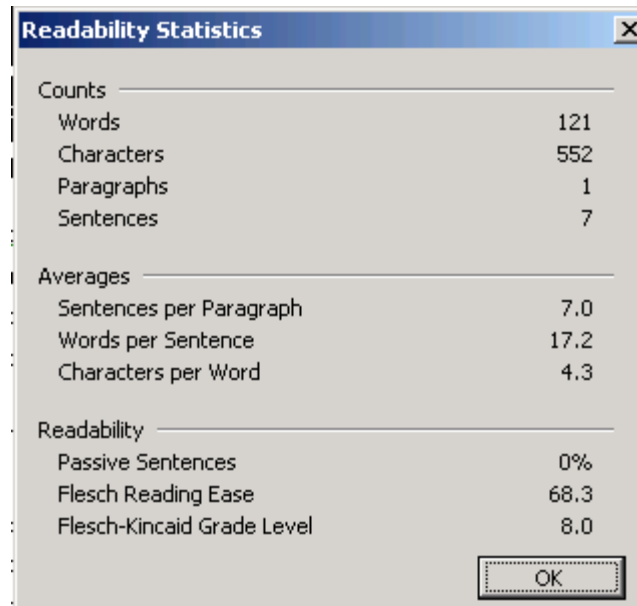


Five ways to achieve clarity:

1. Short sentences
2. Short words
3. Passive voice $\leq 10\%$
4. Readability index ≤ 10
5. Minimal jargon and acronyms

Show the Technical Expert or SME...

How to let their word processor do the work.



The image shows a 'Readability Statistics' dialog box with a close button (X) in the top right corner. The dialog is divided into three sections: 'Counts', 'Averages', and 'Readability'. Each section contains a list of metrics and their corresponding values.

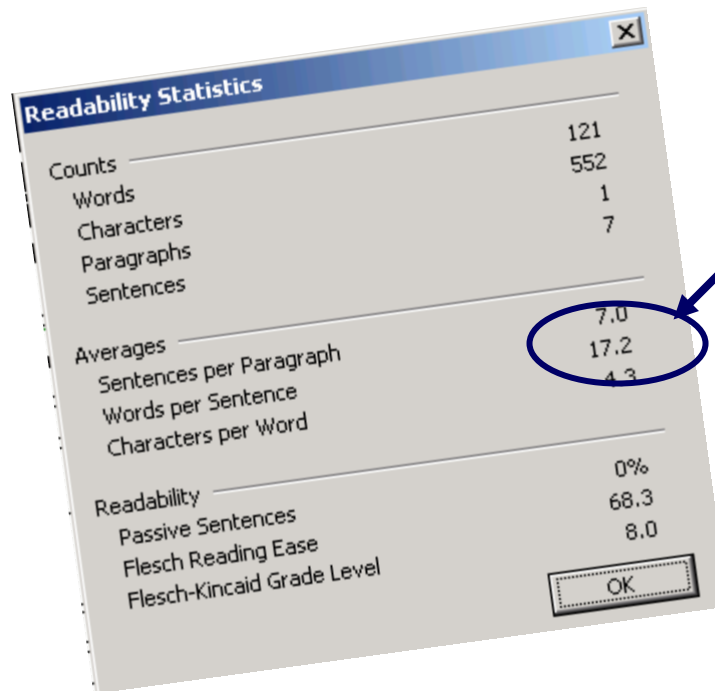
Counts	
Words	121
Characters	552
Paragraphs	1
Sentences	7

Averages	
Sentences per Paragraph	7.0
Words per Sentence	17.2
Characters per Word	4.3

Readability	
Passive Sentences	0%
Flesch Reading Ease	68.3
Flesch-Kincaid Grade Level	8.0

An 'OK' button is located at the bottom right of the dialog box.

Let the word processor do the work.



Readability Statistics	
Counts	121
Words	552
Characters	1
Paragraphs	7
Sentences	
Averages	
Sentences per Paragraph	7.0
Words per Sentence	17.2
Characters per Word	4.3
Readability	
Passive Sentences	0%
Flesch Reading Ease	68.3
Flesch-Kincaid Grade Level	8.0

Average sentence length

15 to 17 words per sentence is a good average sentence length.

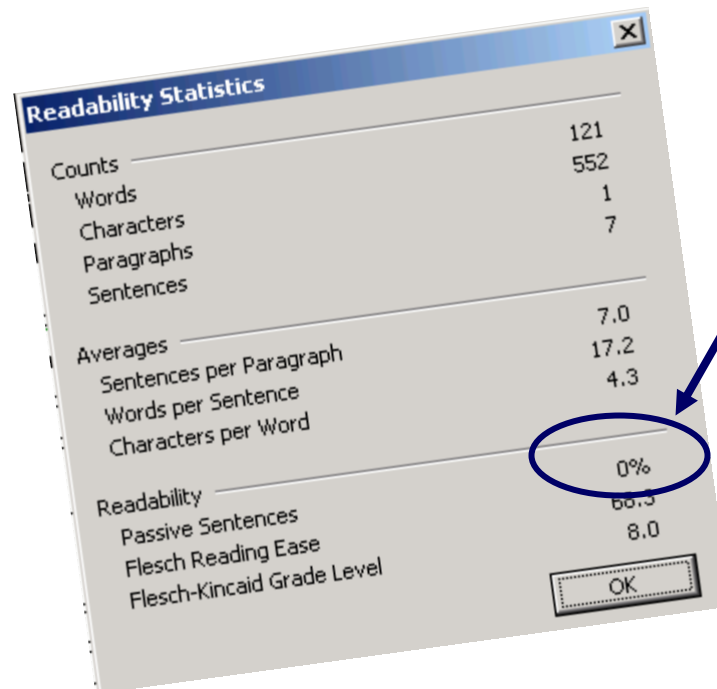
Let the word processor do the work.

Readability Statistics	
Counts	121
Words	552
Characters	1
Paragraphs	7
Sentences	
Averages	
Sentences per Paragraph	7.0
Words per Sentence	17.2
Characters per Word	4.3
Readability	
Passive Sentences	0%
Flesch Reading Ease	68.3
Flesch-Kincaid Grade Level	8.0

Average word length in characters

5 characters or less means your words probably aren't too long.

Let the word processor do the work.



Readability Statistics	
Counts	121
Words	552
Characters	1
Paragraphs	7
Sentences	
Averages	7.0
Sentences per Paragraph	17.2
Words per Sentence	4.3
Characters per Word	
Readability	0%
Passive Sentences	66.3
Flesch Reading Ease	8.0
Flesch-Kincaid Grade Level	

Percentage of passive voice

Keep passive voice below 10%.

Let the word processor do the work.

Readability Statistics	
Counts	
Words	121
Characters	552
Paragraphs	1
Sentences	7
Averages	
Sentences per Paragraph	7.0
Words per Sentence	17.2
Characters per Word	4.3
Readability	
Passive Sentences	0%
Flesch Reading Ease	68.3
Flesch-Kincaid Grade Level	8.0

Readability scores

Aim for a Flesch-Kincaid Grade Level index of 10 or less.

Coercion?

Take a “top down” approach

Set acceptance standards and hold to them.

Red flag out-of-date content or inadequate submissions.

Make successful contribution to RFPs a reviewable item during standard performance appraisals.



Questions?

Comments?


Good luck... in developing winning proposal text!



Dr. Tom Sant

Bridging the Gap with Field Sales





Why is there a gap
between field sales
and
the proposal operation?

Reason # 1: Sales Mythology



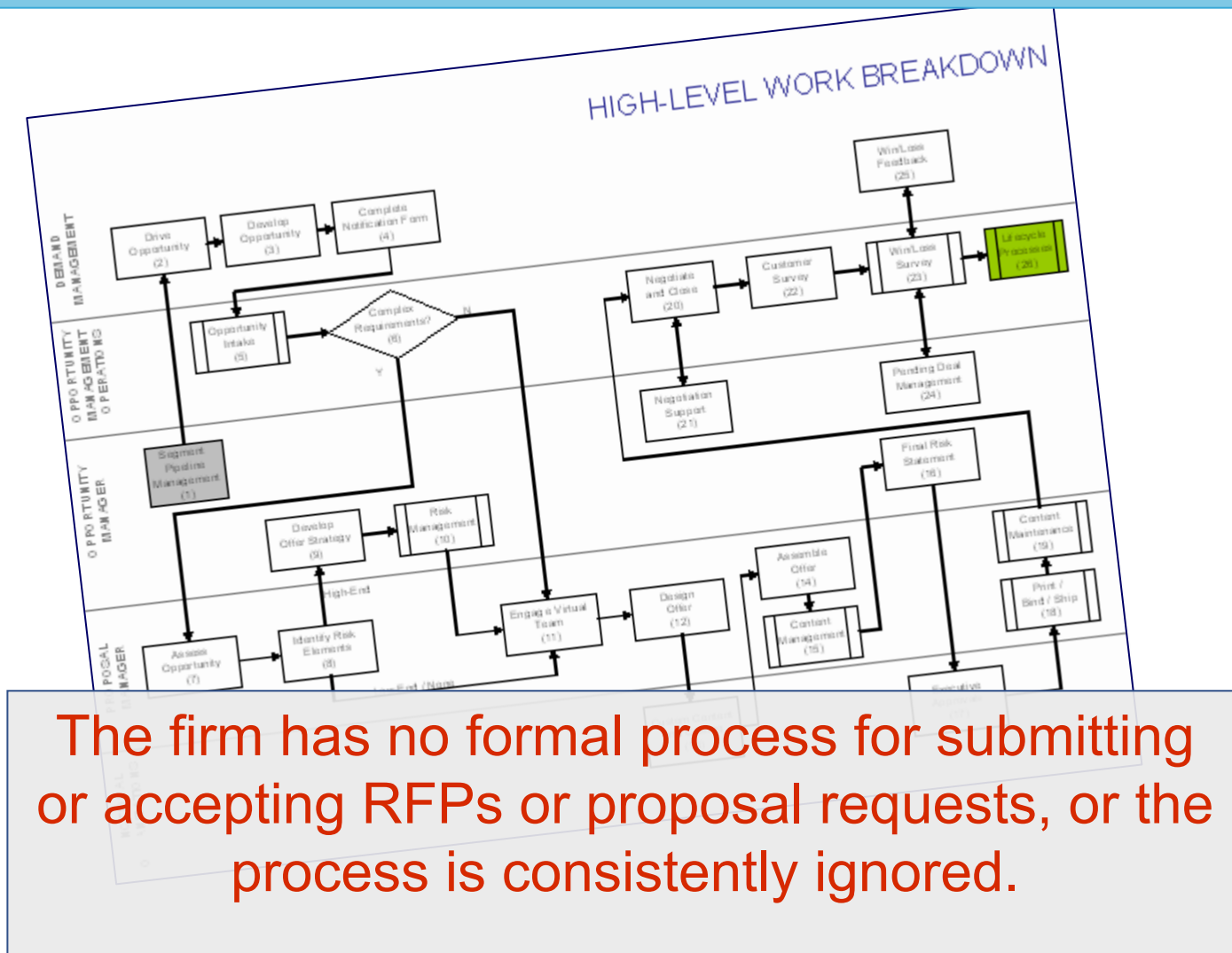
The proposal is merely a “checkbox” item and doesn’t matter to closing the deal.

Reason # 2: No Boundaries



The proposal team is obligated to accept every submission.

Reason # 3: No Process or No Teeth



The firm has no formal process for submitting or accepting RFPs or proposal requests, or the process is consistently ignored.

Reason # 4: Clueless about the Work



Sales personnel do not understand or respect the time involved in completing a response.

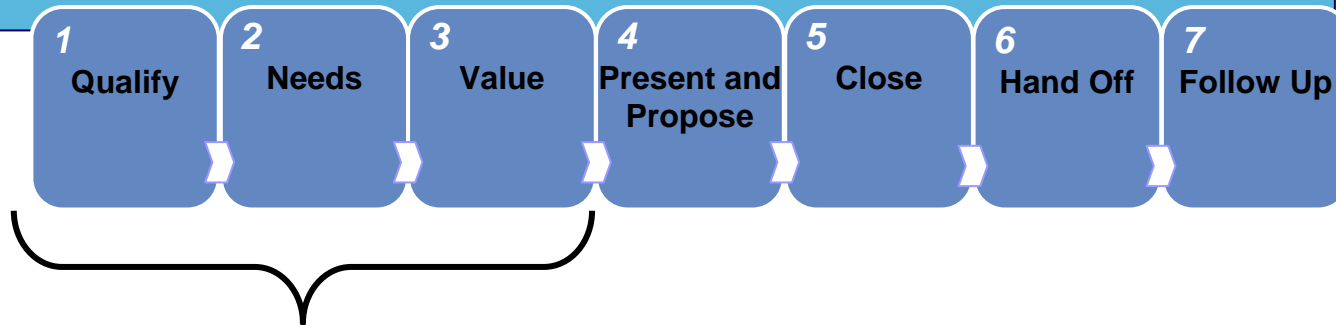
Reason # 5: No Collaboration Protocol



The proposal team doesn't know what or how to ask field sales personnel.

Persuasion Is Based on Good Sales Processes

Sales Process Steps



Sales people who put the most time into the early stages of the sales process, *close 27% more business* than those who put it in the middle and late stages.

Persuasion
is
client-centered
communication
structured to affect
the way the audience thinks,
how they feel,
or what they do.