



Get the Job, Part 2



Thoughts on the art of writing winning proposals. BY DON KRESKI

Some consultants will use a two-envelope process to sort through requests for proposals: one for the company's qualifications and specifications, and the other for the price. If the information in your first envelope is compelling enough and your price within reason, yours might be the only bid considered.

Last month, we looked at the science of responding to requests for proposal (RFPs): the processes you must go through to ensure that your proposals realistically describe what you plan to do, set a profitable price on your work, and protect you from unexpected demands and issues.

This month, I'd like to ask the question: Can the way you write up a bid document help you win the bid?

In a perfect world, that would probably not be the case. But since this is the real world, you have to realize that a significant portion of RFPs are sent when the client or consultant is not sure who the most qualified bidder may be and has trouble evaluating the bidders' qualifications. So if you want the best chance of winning, you need to make several points in your proposal that go over and above your description of how you intend to complete the project and at what price.

"It is a selling document," says K.C. Schwarz, founder and CEO of the Northglenn, Colo.-based buying and integration consortium USAV Group. "You have to present the core information about your company that explains who you are and why that's important."

THE TWO-ENVELOPE PROCESS

Consultant Jeff Loether, president of Gaithersburg, Md.-based consulting firm Electro-Media Design, explains that some consultants use a two-envelope process to help determine who is the most qualified bidder and quantify how much those extra qualifications may be worth.

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—Jeff Loether, president of
Electro-Media Design

“In the first envelope go your responses to a series of questions we ask: ‘Please tell us about your experience doing projects like this,’ ‘Please give us a list of similar projects,’ and so on,” he says. “Then we review those responses and give each answer so many points.

“In the second envelope is your price. When we get all the bids, we open each envelope one and rank their scores from the highest to lowest. Theoretically, if envelope two from the most qualified bidder is within budget, we should award the bid to that contractor without opening the others.”

In practice, Loether says, the consultant and the owner do open all the envelopes, and they discuss the trade-offs. If the second-most-qualified bidder has a significantly lower price, he or she may get the contract. Or the low bidder may win if they think he’s qualified enough to complete the job successfully. “But the idea of this process is that we would not accept low bids from unqualified contractors,” Loether says.

If a given RFP asks these types of qualifying questions, then your first priority is simply to answer them. If not, you need to make sure your proposal answers them anyway, even if your company is well-known to the consultant and the client. “After all,” Schwarz says, “the document is going to be read by many people, and some of them will have no idea who you are.”

WHAT YOU NEED TO CONVEY

Loether says his primary concern in sending out an RFP is to help his clients get the most for their money. “From my view, value is a balance of six attributes: flexibility, ease of use, performance, first cost, operating cost, and reliability,” he says.

To judge who is likely to provide the best value, he says determining the contractor’s qualifications is the first priority, followed by responsiveness—that is, whether he or she follows the directions carefully, meets the specifications, or suggests, in a helpful way, how he might do something better. “A contractor who can’t or won’t follow the instructions in the RFP is probably not going to follow the specifications on the job site very well either,” Loether says.

How do you show that you’re well-qualified?

Pete Dugas, CEO of Atlanta-based integration and consulting firm TSAV, explains, “I see more value in saying, ‘We’ve done these similar jobs successfully,’ than anything else. That’s definitely a way of showing why we think we can handle this project.

“You should talk about who your people are, what their specific qualifications or certifications consist of,

as part of a section about your company.”

Try to quantify as much as you can, Dugas says. Can you put some kind of numbers to your track record, your levels of success or customer satisfaction?

“You want to address your capacities within the period of time you’ll be working on this project,” he says. “Do you expect to have adequate time, adequate capacity, and why?”

“Your company’s values are also very important. If someone is going out and buying something that costs \$100,000, they’re going to consider a lot of facets, including the character and integrity of the people they’re buying from.”

For that reason, a client list and reference list may be helpful, but not necessarily your entire client list. Instead, include a list of relevant clients and specific references from people at organizations similar to the one you hope will hire you for this project.

Schwarz says he asks USAV members to build proposals around three key factors: “‘Who we are,’ ‘How we do business,’ and ‘Here’s this project and what specifically we will bring to bear,’” he says.

As part of that approach, he suggests highlighting the methods you will use to complete the project successfully. If you will define control milestones or product and program testing, say so in the document. “Do you have a healthy methodology for building AV systems?” Schwarz asks. If so, describing it in the bid document sets you apart from other integrators and helps make the case that you are worth hiring—even, in many cases, if your bid turns out to be higher than the rest.

BOILERPLATING

The sales section of the proposal is so important that both Schwarz and Dugas say every company should develop standard boilerplates for their proposals and make sure everyone uses them.

Of course, there are pitfalls to using this kind of template. “We want to see a proposal that’s relevant to the project,” Loether says. “We understand that people use boilerplates, but they should be edited and made pertinent to the job.”

In the end, directness will be appreciated. “We just try to tell people who we are and what we do,” Dugas says. “There’s no sleight of hand in a proposal. You have to be honest and transparent.”

You may well ask, why go through all this effort if the job will just go to the lowest bidder? “At least six out of 10 are based on price, but not all of them,” Dugas says. “We have definitely been chosen when we were the high bidder. In fact, we’re working on two relatively large projects like that right now.”

The art and the science of proposal writing are important. Mastering them will pay off with more business and more profits. [SVC](#)

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