

## CLIENTS SOUND OFF ABOUT PROPOSALS

Your first line of defense against losing money for your firm is to develop and use a Go - No/Go process for proposals and presentations. But some checklists, while admirable, are developed without the input from those you're proposing and presenting to.

Presentation specialist Ernie Burden suggests developing your checklist by revolving it around your client's likes and dislikes, as evidenced by these answers to questions from both public and private clients.

**Private client:** The process that we take is a little bit different. We set up an internal architectural office, and we do the preliminary test layouts, programming, in-house preliminary budgeting; so that by the time we're ready to go out for an RFP, we pretty much have a budget and a direction for a scope of work. We request that the design firm reviews it, and gives us their expertise to fit out our space.

**Public Client:** We receive letters of interest, which are reviewed by a committee consisting of the client agency, the project manager assigned to that project, our opportunities folks, our community program folks, and our procurement folks. That long list is whittled down to 5-6 firms. The bigger the project, the bigger the firms that get them. We select the consultant based on their technical expertise, and how they relate to the project and how they present their proposal in relationship to the project. Then they are ranked going into the presentation.

**Public Client:** "If you propose the "A" team, that's who we want on the project. We don't want to see the A team in the proposal, and wind up with the C or D team. We have the public trust in mind. We want the best public building that we can get, and we need the best team from the consultant."

**Private Client:** "Larger projects do require larger firms; as they can show more experience with directly related projects. We are reluctant to select consultants that have little experience on any related type of work. – which comes up often."

**Private Client:** "On proposals with joint ventures, we hear 'this is a marriage made in heaven.' Well, there's no such thing, and it doesn't serve the proposer well."

**Private Client:** "What we look for is somebody who is most responsive to what we've requested in the RFP. Typically we don't ask for any design solutions, yet there are firms that think it would make a nice presentation graphically, and that may be a good way to get work, but it's not responsive to the RFP, and it belittles the process."

### Q. How important are first impressions, and what turns you off?

**Public client:** "Most proposals are too big! We want concise, yet directly responsive answers to what's being asked for, and if it's graphically presented well, it scores some additional points."

**Private client:** "Follow the RFP format, because we're going down the line looking for the numbers. If you change it, it throws the whole process off. We want to compare apples to apples."

**Private client:** "We want the response to be specific to our type of business. We first look at the scope to see if it agrees with the RFP. The project pictures and the resumes should all be geared directly to the project."

**Public client:** "The panic button is exclusion. When we get a response and there's things that are not included in your services, it goes to the bottom of the pile."

**Public client:** "We send out an RFP which contains a copy of the agreement, so you know what's expected of you. When responding to public work, make sure you get the Minority firm goals and ratios correct."

### Q. How can a new firm catch your attention?

**Private client:** “In the corporate sector, relationships are great, but it’s all presentation and how you capture that. When making your pitch, don’t give us just 3 pages of information, when others are giving us binders full. In other words, put the effort into it.”

**Public client:** “We try to invite new firms at least half the time. We have several types of internal clients. We have the department that reviews the project – we have the department that will pay for the project – with have the sister entity that has to maintain the project, and they all have totally different views – they’re all looking for different things. To the extent that we can, we tailor it to satisfy as many of those internal issues. We try not to use the same firm over and over.”

**Q. Will repeating the wording of the RFP verbatim show our understanding?**

**Public client:** “Not exact feedback of the RFP language, but how you can represent your understanding of the project from what’s described in the RFP. What can you provide as an in-depth understanding of what’s driving the RFP.”

**Q. What’s a good way to position the exceptions to the RFP?**

**Public client:** “If the RFP is generic in nature, and we don’t specifically ask for something that you know belongs there – put it in. Don’t come back during the job and say you didn’t include geotechnical services for example, because it wasn’t asked for. We’ll pay for it, if it’s in there to begin with.”

**Private client:** “If you haven’t thought the project through enough to include something you need unless we requested it, then, we’re not interested. Your response should go at least to that level of forethought.”

**Q. Is there a danger about getting too elaborate or fancy, or looking too expensive?**

**Public client:** “As long as it relates to the RFP and perhaps to the intent of the project, then there aren’t any real limits. However, if we are doing a research lab, and we get pictures of auditoriums (which we have), that’s a problem right away.”

**Q. How critical are typo’s?**

**Public client:** “It reflects on the care of the proposer, and interest in the project itself.”

**Q. Do you accept unsolicited proposals?**

**Private client:** I do take phone calls every day, and get brochures and letters. One was addressed to “Dear Mr. Committee.” Do your homework, make sure you know who to send it to.

**Q. Related experience; does it have to be exact?**

**Public client:** “Relevant experience does come into play. It has to be a library building for a library project, but not for the same client, or even in the same state.”

**Public client:** Our end users are looking for certain things when they sit on a selection committee. They’re looking for courtroom experience if we’re doing a courtroom. It may not have to be a state or federal courtroom. Infrastructure upgrades don’t necessarily have to do with the functioning of the building.

**Q. What perks the interest of non-professionals who sit on review committees?**

**Public client:** “Experience – relevant experience is number one. Second is graphics, that is how you express that you see the breadth and depth of the project, and not just verbally.”

**Q. Proposal covers?**

**Public client:** “Something more than what you would pull out of marketing file. Identifying the project helps. Adding graphics and photographs of the project will work wonders.”

**Q. Debriefing of losing firms? How often is debriefings requested?**

**Public client:** “The selection process is not a scientific process, and there are always more than one firm that is capable and prepared to do the project. Perhaps it comes down to some chemical reaction that has taken place. We do it on a request basis, but we’re reluctant to do it. It really doesn’t serve any purpose, or give solace to the firms that lost.

**Private Client:** “Basically, the chemistry just wasn’t right. Best example I can give – 3 firms interviewed for an athletic facility. The athletic director said “they’re all qualified, but the last guy is going to be very dull to work with.”

**Q. In Joint-Ventures do you want to see 2 distinct firms with clear lines of identity, or do you like them to be completely integrated – one that looks like a new company?**

**Private client:** “For two architectural firms to joint venture is not desirable, unless it is a huge project. An architect and an engineer is okay.

**Public client:** “We will put a design firm together with one that does contract drawings, but we want to sign a contract with one entity. We expect the results to be transparent. We don’t want to know that this is firm A’s problem, or firm B’s problem. We think of it as being the team’s problem, and how the 2 firms respond to that.”

**Public client:** “I want to see it as seamless. I want one project manager to deal with. I don’t want to hear, and I do hear it, that ‘I have to consult with my JV partner as it was his part of the design.’ That drives me up the wall.”

**Q. How many resumes do you include in 254’s and 255’s?**

**Public client:** “If you’re dealing with a firm with 6 partners, I only want to know the partner that’s going to be on our project. That relates to every one of the consultants. You could have 50 resumes, and only 6 people connected to the project.”

**Private client:** “I’d suggest that you limit it to those people on your organization chart. Sometimes the people shown there are just fluff. I’m not concerned with the QA/QC people, that’s internal control.”

**Q. Relevant experience of the sub-consultants – how much material on them?**

**Public client:** “WE only want to see the major ones. Resumes have become like professor’s curriculum vitae. We don’t care how many articles they wrote.”

Add these to your own checklist, and see the difference it makes. It’s best to know your client’s requirements *before* you write a proposal, than waiting for the bad news in a debriefing.