"Engineers As Marketeers -- Selling Winning Proposals"

August 2018
Dr. Gilberto Moreno
“With SUCCESS comes the OPPORTUNITY to EXCEL at the next level!”

“Anything Worth Doing Is Worth Planning – Anything Worth Planning Is Worth Thinking About!”  John Nesbitt
REFLECTION??

- Who Has Sales Experience / Taken Sales Training?
- “For Me The Best Part of Selling Is...”
- “For Me The Worst Part of Selling Is...”

PRESENTATION FOCUS: Enhance your competencies, skills, and behaviors impacting the proposal writing cycle with proven tools and concepts that will expand the your ability to propose and close opportunities.
“Engineers As Marketeers -- Selling Winning Proposals”
ESLC LEADERSHIP RETREAT
AGENDA

- SELLING SKILLS – A MUST HAVE FOR ALL ENGINEERS
- GETTING STARTED – i^6 LINEAR THINKING
- INTRODUCING THE LOGICAL SELLING PROCESS (LSP)
- KEYS TO WRITING EFFECTIVE PROPOSALS
Selling Skills – A Must Have For All Engineers

“If you can dream it, you can do it.”

WALT DISNEY
“Everyone lives by selling something.” ~Robert Louis Stevenson

“Nothing happens until somebody sells something.” ~Peter Drucker

“You don’t close a sale, you open a relationship if you want to build a long-term, successful enterprise.” ~Patricia Fripp

“Sales are contingent upon the attitude of the salesman, not the attitude of the prospect.” ~William Clement Stone

"Remember that failure is an event, not a person. Yesterday ended last night." ~Zig Ziglar
What Are the Key Competencies For Effective Sales?
“To change the culture you need to engage people’s hearts and minds in the endeavor, to tie their personal desires to the journey toward a culture of competence.”

Michael Zwell

Getting Started – Linear Thinking
Getting Started – What To Think About First?

✓ What “crazy idea” do I have?
✓ What “problem” am I trying to solve?
✓ Why am I doing this? Why is this worth doing?
✓ What is it going to take to do this?
✓ What unique approach am I taking?
✓ What VALUE is my idea proposed to deliver?

Use the i⁶ linear thinking tool!!
### Getting Started – What To Think About First?

#### "I6 UNIT FUNCTIONAL VALUE INITIATIVE PROFILE WORKSHEET"

<table>
<thead>
<tr>
<th>INITIATIVE(S)</th>
<th>ISSUE(S) ADDRESSED</th>
<th>INTENT</th>
<th>INNOVATION INTRODUCED</th>
<th>INVESTMENT(S) RESOURCES REQUIRED</th>
<th>IMPACT(S) FUNCTIONAL VALUE</th>
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<td>&quot;What resources are necessary to realize the anticipated results?&quot;</td>
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Organization/Unit: ___________________________  Timetable Reviewed ____________  Page ___ Of ___
Using This Tool To DISSECT an RFP?

**16 UNIT FUNCTIONAL VALUE INITIATIVE PROFILE WORKSHEET**

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<th>INITIATIVE(S) Underway = U Committed To = C Proposed = P</th>
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<td>“What are the expected success outcomes or VALUE?”</td>
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Created by Gilberto Moreno, Jr.
Introducing The Logical Selling Process (LSP) Tool

“Ultimately magic finds you if you let it.”
Tony Wheeler
“Every sale has five basic obstacles: no need, no money, no hurry, no desire, no trust.”

~Zig Ziglar

“Most people think “selling” is the same as “talking”. But the most effective salespeople know that listening is the most important part of their job.”

~Roy Bartell
What Is The VALUE In Managing The Sales Cycle?

What is a sales cycle and why is it important?

A sales cycle is the series of predictable phases required to sell a product or a service. Sales cycles can vary greatly among organizations, products and services, and no one sale will be exactly the same.

However, identifying the key steps and stages improves sales efficiency, help salespeople sell more, and speed up the process of on-boarding new sales hires.
The Logical Selling Process...

- **GAIN INTEREST AND BUILD AWARENESS** – What is the initial value statement (IVS) that will generate and sustain interest? How will the projected service users become aware, understand, and gain interest in using the services proposed?
- **VALIDATING CLIENT NEEDS** – How will the potential client connect the proposed business plan services and products to his / her needs? What is the qualification process for potential clients to engage in and consider the use of the proposed products or services?
- **HIGHLIGHTING THE SOLUTION VALUE** – Given the needs defined above, how will the products and services be highlighted to assure a potential client recognizes the value and benefit of engaging with the URG system? What service value proposition is to be highlighted?
- **GAINING A COMMITMENT TO ENGAGE** – What is the process to engage a client who indicates interest and is ready to commit to the proposed services? What might be the objections that arise from the prospective client that need to be addressed? What promotion strategy can simplify and increase the process of gaining commitment to engage?
THE LOGICAL SELLING PROCESS (LSP)

Interest Generation  “Do you have their attention?“

The Initial Value Statement (IVS)  “Can you keep their interest?“

Client Needs Assessment  “Do you really know what they need?“

Summary of Client Needs  “What is the most important problem to solve for them?“

SOLUTION Selling  “How does your solution satisfy their most pressing needs?“
- Features
- Advantages
- Reaction or Results Desired  “Do they see the VALUE?“

Objection Handling  “What’s keeping them from buying from you?“

Closing the Deal  “Have you asked for the business?“
THE LOGICAL SELLING PROCESS (LSP)

Using the LSP To Write Winning Proposals

Interest Generation

The Initial Value Statement (IVS)

Client Needs Assessment

Summary of Client Needs

SOLUTION Selling
   Features
   Advantages
   Reaction or Results Desired

Objection Handling

Closing the Deal

Where In Your Proposal Have You Written This??

Do We Know The Selection Criteria??
“Vision without implementation is a hallucination.
~ Fr. Theodore Hesburgh

Keys To Writing
Effective Proposals
1. Understand the concept
A proposal is a sales tool not an information packet. The purpose of the proposal is to make a persuasive case that leads to a sale. To win the business, your proposal must overcome the following hurdles:

*Do I know who this is?* If this is the first time the customer has heard of you, your proposal will be thrown out.

*Is this proposal compliant?* If the customer provided a template for the proposal, proposals that don't follow that template will be thrown out.

*Does this proposal make sense?* If the executive summary does not define the problem correctly or propose a reasonable solution, the proposal will be thrown out.

*Does the solution provide value?* Of the proposals that met the minimum as defined above, the one that wins will be the one that provides the most value.
How to Write a Winning Proposal...

2. Research the customer.
The proposal will not win if you fail to uncover the customer's true decision criteria and decision-makers. These may be quite different from the criteria and decision-makers defined in a Request For Proposal (RFP).

3. Lay the appropriate groundwork.
Your proposal will be thrown out unless you've done marketing and sales activities that establish recognition in the mind of the decision-maker.

4. Brainstorm your approach.
What proof can we offer that we are qualified and competent? What quantitative promise (value proposition) are we willing to make? How can we demonstrate that the value we propose to offer is credible?
5. Write the executive summary.
Contrary to popular belief, the executive summary is NOT a summary of the contents of the proposal. It is a summary of the basic issues, the proposed solution, and the promised results.

6. Write the body of the proposal.
The body contains detailed explanations of how you will do the work, the people involved, your prior successful experience you have in this area, and evidence of your core competency and financial stability. In many cases, the customer will have already defined the structure of the proposal or provided a template. If so, follow that structure exactly.

7. Mercilessly edit the whole thing.
Appearance is as important as content. There should be no obvious grammatical errors and an absolute minimum of typographical errors. If boilerplate (standardized material from other proposals) is included, it must be carefully customized to match the customer's own situation.
“PROPOSAL OPPORTUNITY PIPELINE”

Suspects

Prospects

Buyers

Clients

Coverage Rate

Engagement Rate

Win Rate

Do You Have A Shot At Winning An Award?

DEdICATION-MAKER??
COMMIT FUNDING OR RESOURCES??
DO IT NOW??

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<th>Mistake</th>
<th>Example</th>
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<tbody>
<tr>
<td>1. Using the Wrong Medium.</td>
<td>“The less work it takes to accept your proposal, the more you’ll close.”</td>
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<tr>
<td>2. Making the Proposal Too Long.</td>
<td>“Proposals less than 5 pages in length are 31% more likely to win business.”</td>
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<td>3. Not Delivering the Proposal Quickly.</td>
<td>“Winning proposals get to their clients 26% faster than losing proposals.”</td>
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<td>4. Not Using Pricing Psychology.</td>
<td>Are you using value language in your pricing psychology?</td>
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<td>5. Not Highlighting the Client’s Return on Investment.</td>
<td>“Show your client that their investment will deliver a strong return.”</td>
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<td>6. Not Following Up.</td>
<td>“Always provide value and be helpful when following up on proposals.”</td>
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• Final Reflections
• Questions?

THANK YOU FOR YOUR ENGAGEMENT!!