A Benchmark Learning International White Paper

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Present to Win!

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A White Paper by BenchMark Learning International

You've submitted an excellent proposal and have been selected to make a final presentation to your potential customer, along with four of your closest competitors. But, your next proposal is gearing up and your Project Executive and selected Project Superintendent are wrapping up their current project. The only solution is to put the presentation together in the shortest time possible and review it with the team the day before. Hopefully, you will be able to get a few practices in before "showtime."

You are optimistic as you enter the presentation room, especially since you are the last team to present – you are sure that they will remember the last team to present! After introductions you begin your presentation and it becomes very clear you are failing – there is no "flow" to the presentation, the team doesn't remember the messages you drilled in them the day before, and the proposed Project Superintendent gets mixed up about the plan to complete the project, using examples from his current project. On top of that, the question and answer session went poorly – you were never quite sure who should answer each question and the Project Executive kept interrupting others to give a "sales pitch."

Of course, you lost the project. In the debrief, the customer praised your efforts on the proposal, even stating that it was the second best of the five who were shortlisted. The customer was unanimous, however, in their assessment of your presentation, stating that you appeared unprepared, uncomfortable, and tried a last-ditch effort to sell them without indicating that you understood their needs.

Has this ever happened to your company? Most likely, it has on at least a few occasions. Sometimes you get lucky and "pull it off;" but much of the time you do not focus enough attention on the presentation.

Introduction

The purpose of this white paper is to emphasize the importance of devoting time to creating and practicing for essential customer presentations, such as those used to select bid winners. It has been our observation that far too many superb proposals are followed by a mediocre presentation, leading to a loss.

This white paper provides a framework for you to focus your preparation and delivery to be customer focused and lead to clear positive differentiation for you from the competition.

Shameless plug (and the only one): Having an objective, outside consultant lead your efforts in designing and preparing for your presentation can make the difference. Developing and delivering effective presentations is a skill that your team should learn from a professional. From creating a differentiated design to coaching your team members in delivery skills, we can help you create a winner.

Why the Presentation?

In construction projects the construction manager or general contractor works closely with the owner and stakeholders throughout the life of the project. Proposals are important, but often little separates one bidder from another. The presentation can end up being the deciding factor in the customer's decision. There are a number of purposes for the presentation, but one of the most important is that it answers one very important question for the owner – Do I want to work with these people?

Another purpose of the presentation is for the evaluation team to gain clarification on any ideas you presented in the proposal and ask any questions that are important. It is key that you have this in mind during your preparation. If you put forward any unique ideas or approaches in the proposal, be prepared to justify and explain them.

Evaluators also want to view a comparison between the bidders in how well they work together and also how effectively they listen to their needs and requirements. Be sure to demonstrate in your presentation that you have, in fact, listened to the owner.

Presentation Goals

Your main goal for the presentation is to clearly differentiate yourself from the competition – in a positive way and in a way that the owner will have confidence in you and *want* to work with you. The best presentations are those that give this confidence to the customer and, because of creativity and customer focus, are remembered in the coming weeks when a decision is made between the bidders.

Of course, one of your goals should also be to communicate the right messages to the potential customer. Having the "intelligence" to know what it is the members of the selection team want to hear is critical to "checking all the boxes" and going further in providing unique solutions to the customer's key issues.

Your presentation should also showcase your team members and their skills and ability to work as a team. Multiple practice sessions can demonstrate these attributes even if the team members have not worked together in the past.

Simply the experience of practicing together for a flawless delivery creates a team experience that can appear seamless to the evaluation team.

It's Not About You

Just as your proposal should be about how you will solve the owner's key issues, provide the best value and do an excellent job; your presentation should be about the customer as well. What is important to the owner? What are the key issues that each stakeholder is concerned about? What are the tensions within the owner's team and what are the causes?

You've made a very good offer in your proposal or you wouldn't be selected to present. Now is not the time to take the focus off the owner. Yes, you can talk about what you are offering, especially if your offer differentiates you from the competition. However, you should always speak about what <u>benefits</u> you are bringing to the owner, the project, and their business. You have an excellent solution or plan – so what? Ask what this means to the owner and express it to them in no uncertain terms…You will receive X which will do Y for you, resulting in a saving of Z (financial, schedule, etc.).

For example, I recall one presentation where the team was going to show a series of slides with pictures of their new facilities. So what? What does this mean to the customer? If, in fact, the customer will receive some benefit from the new facilities, there possibly could be a valid reason for showing the pictures. Most likely, however, the evaluation team will be asking, "So what?"

Never talk about you or your organization without expressing how it will benefit the customer. Even when introducing your team, explain how their special experience or unique talents will benefit the project and the owner.

Customer-Focused Behaviors

Not only is it important that your presentation be customer focused and be oriented toward the customer's needs, the behaviors of your team members must also demonstrate customer focus. For example, presenters should maintain eye contact with their audience. No one likes a presenter who reads the PowerPoint presentation to them. If your team knows their presentation content well, they can focus their attention on the audience members.

Eye contact should also be specific. If you are presenting a segment on safety, the majority of eye contact should be with the person on the evaluation team most concerned about safety. Do not ignore the others, but use the safety-concerned person as the "anchor" and keep coming back to eye contact with them.

One final note on eye contact. If you are presenting well, the evaluator's eye contact will be toward the speaker, not the slide presentation. They may scan the slide when it first changes, but they should only be looking at the detail of the slide when the speaker directs them to do so.

Presenters should use adequate volume for the size of the room. If the room is small, there is a tendency for speakers to speak too loudly. On the other hand, if the room is large and the evaluation team is some distance away, presenters must be sure to speak loud enough for the team to hear them clearly. Volume and voice tone can be used to emphasize major differentiators or solutions to the customer's key issues. Speak clearly and with emphasis when presenting differentiators. Another method to get attention and emphasize a point is to lower your volume (not too low, just a contrast from the previous level). Any change in volume or tone will get the audience's attention.

Other members of your team must be alert and engaged in the presentation as well. They are being observed as well. Too often we see members of a presentation team looking bored and on the verge of sleep while a colleague is presenting. When the presenter says something positive or mentions a differentiator, colleagues should subtly nod their heads in agreement to emphasize the point.

If you have a time limit for a portion of the presentation, be aware of it so you can present accordingly and not be rushed at the end. And, by all means, complete your presentation on time.

Transitions between team members must also be smooth and demonstrate to the customer that you work well together. This is accomplished by repeatedly practicing the transitions. The presenter should always introduce the next speaker and state what they will be speaking about. The incoming presenter should approach the front with enthusiasm and energy, thanking the previous presenter by name.

Preparation

Before practicing the presentation, you must prepare. Preparation can be done by a smaller team before the whole team assembles for practice. There are two phases to preparation: First, determine the general outline of the presentation. Brainstorm the major topics and list the differentiators and key messages you want to present. Use a white board to capture the information and assemble it into a good "story." Be sure you are covering all the topics of importance to each member of the evaluation team. Don't worry at this point about projected time or who is going to present what in the presentation; simply capture all the messages to be communicated.

Next, develop the outline further by creating "bullets" of information under each topic. Use the format: Feature – Benefit – Proof (FBP) to list the information. In other word, what you are providing, what benefits it brings to the customer, and evidence that the benefits are real (and you have done it before with positive results). Continue to flesh out each section to be sure everything is included and all the features, benefits and proofs are listed.

Once the presentation is complete on the white board, begin to develop the PowerPoint slides. It is important that during this phase you have a team member participate who not only knows PowerPoint well, but is also very creative. We recommend that information be presented on the slides in text, but also using a visual where possible (more about PowerPoint rules later). Many people are "visual" oriented and a picture does, in fact, communicate a thousand words. As the first draft of the PowerPoint is being put together, all team members should brainstorm ideas on how each message can be shown visually.

After the first draft is completed, one person should walk through the presentation as the others listen. The objective at this point is to examine the flow and determine what is missing in the presentation. Again, at this point do not be concerned about time, only content.

Walk through the presentation repeatedly, making changes as you go to add content or delete it when things don't flow smoothly. The final presentation will probably not look very similar to the first one – and that is a good sign; it means that you have thoroughly thought out your presentation. One other tip - have one person continually look at each point as you walk through to ensure that the benefits to the customer are clear.

Team Member Selection

Often, the customer or owner will request certain people to be part of the presentation, the proposed project manager for example. Other times, you must decide who are the key presenters. A rule of thumb is that you should never have more presenters than there are members of the evaluation team. You may, however, take some specialized people to be available during the question and answer period.

Give serious thought about who is presenting what parts of the presentation. Just because someone is an excellent presenter should not mean they have the "leading role." The roles that will be filled on the upcoming project should be the determining factor regarding what each person presents.

It is customary for a leading executive or President of the presenting company to have a part of the presentation. Often, this person speaks at the end to make a personal commitment that the project will be accomplished smoothly. We recommend that the executive be fully briefed on the project beforehand and participate in, at least, the final two practices. The executive should reiterate the key messages and differentiators as a summary.

Often, the proposed project superintendent needs to present. This gives the evaluation team a feel for the person they will be working with on a daily basis. However, your project superintendent may have been working on another project for the past two years and has not made a presentation since then. Their presentation skills are sometimes shaky, at best. Also keep in mind that the project superintendent is not only making a presentation to the potential customer, but is also doing it in front of their whole "chain of command," often including the company president – talk about pressure! Thus, we strongly recommend that the proposed project superintendent (and any other field personnel) be present for all the practice sessions. The more they practice, the more comfortable they will be on presentation day.

Practice

We previously mentioned that the best presentations are those that are practiced multiple times by the team. Practice is critical, but it can be difficult to pull off. Most presenters have other duties and responsibilities and their time is limited. What follows is a guide on how to practice with a sufficient amount of time to devote to it. We can't emphasize enough that somehow practice time must take place. If it is a problem getting everyone together because of job duties, work together to find a solution. Winning the project is too important to skimp on practice time, especially after a herculean effort on the proposal. There is always a solution or workaround to gain the right amount of practice time for the team.

Practice is done in two phases: walk throughs and run throughs. Walk throughs are used to familiarize all presenters with the content that was developed earlier. The team that prepared the presentation leads the walk through and indicates who is presenting each section. After everyone is comfortable with the content, the first run through should take place.

Don't time the first run through or even provide critique of each speaker. The idea is to get everyone comfortable with the content. After the initial run through, begin timing each practice session. You may learn early-on that you need to cut time or even add some content. You can still make changes to the presentation at this point.

After the second run through, have a discussion focusing on what worked well and what didn't. There is no need at this point to provide specific feedback on presentation style to each presenter, that can come later.

After the second run through, we recommend that someone (typically we would do this) give a presentation on customer-focused techniques – body language, transitions, eye contact, voice volume and tone, etc.). Then, emphasize to the team that every practice session moving forward will be timed and feedback provided.

We recommend that time be allocated between each practice session for presenters to privately review their notes and practice on their own. Everyone has a different technique to get ready and ensure that they are covering the content the best way possible. Giving time between practice sessions honors this difference and enables any presentation coaches to work one-on-one with presenters.

Figure 1 on the next page is a typical practice schedule for a team facing an important bid presentation. It assumes the base presentation has been prepared prior to the practice session and that the actual presentation is on the morning of Day 4.

Figure 1 – Sample Practice Schedule

DAY 1	DAY 2	DAY 3	DAY 4 AM
Overview of Presentation (including main themes and differentiators)	**Run Through #1**	**Run Through #4 (with Q and A)**	Final Presentation Walk Through (if time allows)
Walk Through #1	Presentation on Customer-Focused Presentation Behaviors	Feedback and Individual Coaching	Travel to Presentation Site (allow PLENTY of time for everyone to arrive.)
Discussion	**Run Through #2**	**Run Through #5 (with Q and A)**	
Walk Through #2	Feedback and Individual Coaching	**Run Through #6 (with Q and A)**	
Walk Through #3	**Run Through #3**	**Run Through #7 (with Q and A)**	
Discussion on upcoming Run Through expectations	Feedback and Individual Coaching	Team Building Session (we recommend informal dinner or reception)	
Identification of Potential Q and A Topics	Run Through Potential Questions with Answers.		

This schedule is a good basis to work under, but we understand that some interruptions and changes may take place. The program should be managed by a senior leader or outside consultant to ensure that it moves as smoothly as possible and changes to the schedule are communicated to everyone.

Feedback

Throughout the practice sessions, the simulated evaluation team (and others) will be giving presenters feedback on the content and their delivery skills and behaviors. Be careful that the feedback is presented in a way that it is not demoralizing to the presenters or give contrary feedback. One suggestion is that the evaluation team meet separately immediately after the practice session for a few minutes to be in alignment on the feedback they provide. In addition, feedback should focus on 2 or 3 specific things that the presenter can improve for the next practice session. Giving a complete laundry list of everything the presenter needs to change at one time can be overwhelming and counterproductive.

The simulated evaluation team should put themselves in the customer's position and give feedback based on how the presenter came off to the "customer." In other words, consider these two feedback snippets. Which do you think is more productive?

> *"John, you really missed the boat on explaining our safety plan. Do a better job in the next go-around!"*

> *"John, one of our key differentiators from the competition is the safety awards we have received building the Hanson Dormitory. This project is very similar to Hanson so be sure to stress the awards next time."*

Certainly the second feedback was more productive. Now, let's look at a more behavioral example. Consider the following two examples:

> *"John, you didn't come off very well. You didn't make eye contact with me and your presentation was not inspiring."*

> *"John, because you didn't make much eye contact with me, I felt ignored and I became frustrated. In the future, move your eye contact around to all the members of the evaluation team. Help all of us feel included."*

Feedback is a critical part of the practice sessions. It should be specific, based on observations, and emphasize how it felt to the person in the audience. It should also be given with a recommendation on what the presenter can do to change the behavior moving forward.

Question and Answer Session

Preparations for the Q and A session often fall by the wayside or only take place during the final practices. Some teams go into the presentation scared, not of the presentation, but of the Q and A because they realize they did not adequately prepare. We recommend that during the development of the presentation a running list of potential questions be created. In addition, send an e-mail to anyone who knows about the program or has had experience with anyone on the evaluation team soliciting their ideas on possible questions.

The potential questions should then be discussed and selected early in the practice sessions (see end of Day 1 on the above schedule). The final questions should then be distributed to the team and a succinct, benefits-rich answer developed for each question. In addition, assign who will answer each question if it comes up. Remember, just as during the presentation, focus on FBP – features, benefits, proofs).

During the Q and A session, your team should have a "Master of Ceremonies" who fields the questions. The MC then either answers the question (if simple and appropriate) or throws it to the appropriate team member. After the succinct and benefits-rich answer, go smartly on to the next question. Rarely should a team member who does not answer the question jump in with additional information. If there is a key element the answerer missed, let the MC add to the answer or ask someone else if there is anything to add.

If you are not the MC, do not, do not, do not correct a team member if they say something incorrect. It will only serve to show the team member was lacking and highlight the mistake to the evaluation team. Some common sense should be used in this situation. If it is clearly apparent that the evaluation team saw the mistake (raised eyebrows), it is up to the MC to smoothly provide the right information, even throwing it back to the team member who made the mistake to smooth it over. ("*I think you meant that we would finish the foundations in 3 months, not four – right, Joe?*" "(Joe) *Right! I meant to say 3 months, enabling the project to be completed early as we promised* (benefit)."

In summary, Q and A should be treated as a very important part of the presentation, and should be a part of the practice sessions. Many companies have been tripped up by not preparing for Q and A. The look of bewilderment on a presentation team's faces when asked a simple question that they are not prepared for is very telling to an evaluation team.

PowerPoint Tips

Finally, it is important to say a few words about using PowerPoint slides, the norm for almost all presentations. Remember, never read the slides – they are a reference point and should contain the key messages and differentiators. The focus should be on the presenter, not the slide (unless guiding the audience through a flowchart or map or diagram, for example). Here are a few tips:

- KISS – Keep it Simple Stupid – Do not overcomplicate the slides
- Minimize text – no more than six words across each line and no more than six lines of text
- Use visuals – Remember, *simple* pictures give a strong message
- Remove anything from a picture not relevant to the message
- Use a different color of text to emphasize differentiators

Throughout your practice sessions it is important to keep these guidelines in mind and continually improve what is being shown. However, as soon as possible you should "freeze" the presentation so that the presenters become familiar with the final version.

Expect the Unexpected

One final bit of advice would be that you should always expect the unexpected to happen at an interview. The risk is that when something happens that you did not plan for or practice, you and your team become flustered and do not know how to react. If you understand that "stuff happens" and respond in a positive way, you will impress the customer.

Examples include – a change in the evaluation team and the key decision maker is not present, the customer says they just want to talk and do not want to see any slides, or one of your team members does not arrive at the presentation site on time due to traffic, the bulb on your projector breaks (surely you brought an extra bulb and know how to install it quickly). How you react to these kinds of unexpected situations are observed by the customer. So, don't get flustered and take charge and move forward with the presentation.

Summary

Give your audience a presentation they will remember in two weeks! Think about what you can do differently. Remember to practice, practice, practice and take care of your team. Get them excited and treat the presentation as the capstone of a long, hard bid process.

We hope that these guidelines give you the motivation to prepare the right way for your presentation. Doing so will only serve to increase your win rate!

Please don't hesitate to contact us with any questions you may have about this white paper or presentation preparations in general. We are here to help you and available to guide you to a winning presentation.

BenchMark Learning International, Inc.

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