

Write Your Next Proposal Sitting Next to the Client

By Charles H. Green



We all know we should write proposals that are less about us. We know we should spend less space on credentials and methodology; we know we should focus more on results, benefits, and adding value in the proposal.

But we nearly always miss the biggest proposal opportunity of all—to build the relationship.

Rounding up the Usual Suspects--PIRL

You know well the drill; it varies in detail only, differing slightly with the complexity of your business. It probably sounds pretty much like this.

“Great meeting, Joe, we got a lot better feel for things today face to face than we could have done with more phone calls. Thanks for making the time. We’ll have the proposal to you as a .pdf file by end of the week, and FedEx a hard copy with full graphics to you at the same time.

“It’ll include all the specs we discussed to date--capabilities, costing, time estimates, benefits, payback and ROI calculations—everything we talked about.

“After that, we’ll look forward to hearing back from you, and of course I hope you’ll feel completely free to call us with any questions. OK, then, see you, we’ll get this to you by Friday, thanks a lot.”

Now, what is predictable from this dialogue? My guess is, these four things:

- The proposal will start from an existing proposal as a template
- The proposal take about the average amount of time and cost the average amount
- The likelihood of acceptance is your usual hit rate
- No matter how much you stress “feel free,” you will not hear back from the client with any questions. None.

You had a great meeting. If you get the job, you'll have an even better relationship after the contract is signed. But right now, you are in between.

You are in the twilight zone of PIRL--proposal-induced relationship limbo.

What if you could keep the relationship momentum going? What if you could break out of PIRL and do something to really accelerate the value add, and the likelihood of doing something great for the client? And of getting the job as a result?

You can. All you have to do is change one major fact about the proposal.

Don't write it by yourself.

Why We Have Proposals

The socially acceptable presumption is that "proposal" means it's time to go off and write something at arms' length, so that the client can "objectively" study the various options facing them.

Most of the consequences of this evolved social behavior are horrendous, for seller and buyer alike. It draws an awkward halt to a developing relationship. It forces sellers to retreat back to the kinds of things they did at the beginning of the relationship—re-hashing credentials and third party testimonials. It forces buyers to take a step back, to be rational and unconnected. It forces both parties to put benefits into cold, unemotional, factual terms; which means it forces them to translate relationships into clinical terms.

It makes some sense if your objective is to guard against irrational things like trust, relationships and collaboration. If you think the essence of the commercial transaction, however, lies at least as much in people interactions as it does in blinded reverse online auctions, then the proposal process is pretty much a big splash of cold water to the face.

Yet there's one very valuable thing that happens when you say, "I'll send you the proposal." You give the client an emotionally acceptable way of saying "no" to you. This may be the biggest reason of all that proposals exist. No one wants to be the agent of personalizing rejection; and frankly, we don't want to be rejected in person either.

So breaking out of proposal-induced relationship limbo will require an answer to the burning question: “How will I say ‘no’ if I have to?”

The Joint Proposal

Enter the joint proposal. What if, instead of the usual “send it to you Friday” line, you were to say:

“Great meeting, Joe, we got a lot better feel for things today face to face than we could have done with more phone calls. Let me suggest we keep up that progress, rather than shutting it down.

“Let me suggest you book this conference room again for next Tuesday, and we write your proposal together.

“Together, we’ll address all the specs we’ve discussed--capabilities, costing, time estimates, benefits, payback and ROI calculations—everything we talked about. We’ll put in the stuff you need, and leave out whatever boilerplate you don’t need.

“I’ll bring everything I need from our side—pricing sheets, work design outlines—and I’ll be quite open about it. You come with the audience you need this to speak to, and the critical issues the proposal must address. As issues of interpretation arise, we’ll address them together. As issues of understanding arise, we’ll address them together.

“Together, we’ll write the best proposal that can possibly be written for the combination of you and us. Is that the best possible proposal for you? Maybe, maybe not. But we’ll both know that we got the best we had to offer for you out on the table.

“Joe, I know this approach is no guarantee we’ll get the job. In fact, it may become very clear to both of us as we write the proposal that we are particular well-qualified—or badly qualified—to do this work for you. Which means we’re reducing the likelihood of misunderstanding and surprise. Which is good for both of us.”

Now, what is Joe going to say, and think, and feel?

He may say yes, or he may say no.

a. He may think and feel that you are clever and creative and trustworthy, or at least enough to so to try your idea. In which case, you have achieved

PIRL escape velocity and you'll both benefit.

b. He may think it's just a little too risky and avant garde for him to try and sell upstairs—yet still feel like it was a good idea and you are to be commended for being willing to be that open and constructive. In which case, you have offered some value—an interesting new idea—and gained some relationship credibility in the process, even if you still do the conventional proposal.

c. Or, he may think you are a very devious, manipulative person, and feel that you are putting him into an emotionally stressful and embarrassing position, and say no, and be inclined to be suspicious of you.

If your client fits category c, then may I suggest you are dealing with a particular personality type, one for whom proposals provide emotional protection and insurance against relationships. In such cases, gently acknowledge that you appreciate many people prefer the traditional proposal process, and you will be happy to comply.

Then go back to your office, downgrade the probability of winning that proposal, and consider cutting your investment in time in writing it. Because the joint proposal is also a test of the client; can they handle a relationship? If the answer is no, wouldn't you rather find out sooner rather than later?