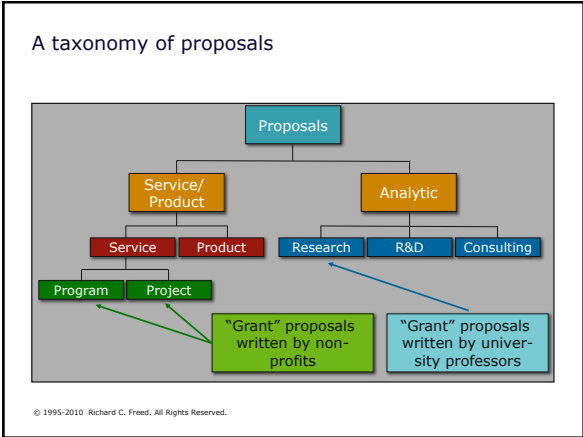


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--Rich Freed

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Service Proposals

<b>Purpose</b>	Propose arrangements for providing a service to meet a need
<b>Intent</b>	To gather and/or disseminate knowledge
<b>Example</b>	<ul style="list-style-type: none"> <li>• (Program): training sessions, workshops, courses, conferences</li> <li>• (Project): soil, water, energy conservation projects</li> </ul>

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Generic Structure—Program Proposal

**Situation:** 19th-century U.S. women novelists played important role in the culture, and our students need to understand the role and contributions; but current curriculum doesn't offer such opportunities

**Objectives:** (The course objectives)

**Methods:** These works will be covered, in this manner, with these tests and papers to ensure that the objectives are met

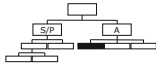
**Quals:** Write dissertation on this subject; continue to read widely and teach successfully in the area

**Costs:** \$\$\$

**Benefits:** Increased students understanding of the role of women writers and of culture itself

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### Analytic Proposals—Research



<b>Purpose</b>	Propose a method to study problem
<b>Intent</b>	To discover its nature, scope, or severity
<b>Example</b>	Proposal to NSF to study ozone depletion

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### Generic Structure—Research Proposal



**Situation:** No one knows the extent of radon gas in Iowa households

**Objectives:** To determine extent and communicate it to public

**Methods:** To make available and publicize availability of accurate, inexpensive testing devices; to analyze results


**Quals:** Distinguished inter-disciplinary university research team; necessary facilities

**Costs:** \$\$\$

**Benefits:** Increased understanding of radon extent: a 1st step in recommending remedial actions

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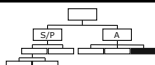
### Analytic Proposals—R&D



<b>Purpose</b>	Propose a method to study <i>and</i> solve a problem
<b>Intent</b>	To develop and test a product according to defined requirements and/or specifications
<b>Example</b>	Proposal to develop a fighter-bomber for Navy

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### Analytic Proposals—Consulting



<b>Purpose</b>	Propose a method to study and/or solve a problem
<b>Intent</b>	To recommend solutions
<b>Example</b>	<ul style="list-style-type: none"> <li>• site-selection study</li> <li>• logistics-strategy study</li> <li>• organizational effectiveness study</li> </ul>

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Sometimes you win because your proposal makes sense

**Logic**  
What you, your team,  
and the firm knows

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Sometimes you win because your relationships are strong

**"Psychologic"**  
How buyers feel about  
you and competitors

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LS&PD considers the logical and psychological

**Logic**  
What you, your team,  
and the firm knows

**"Psychologic"**  
How buyers feel about  
you and competitors

Buyers buy for both logical and psychological reasons

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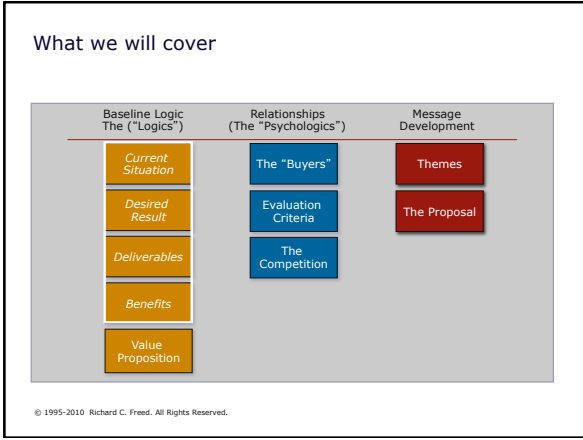
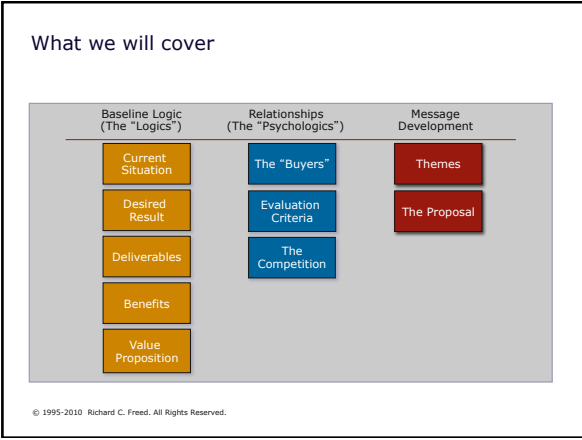
LS&PD considers the logical and psychological

**Logics Worksheet**  
Collective/Corporate Perception

**Psychologics Worksheet**  
Individual Buyers' Perceptions

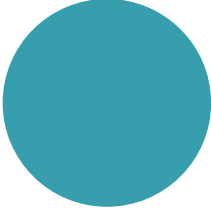
Buyers buy for both logical and psychological reasons

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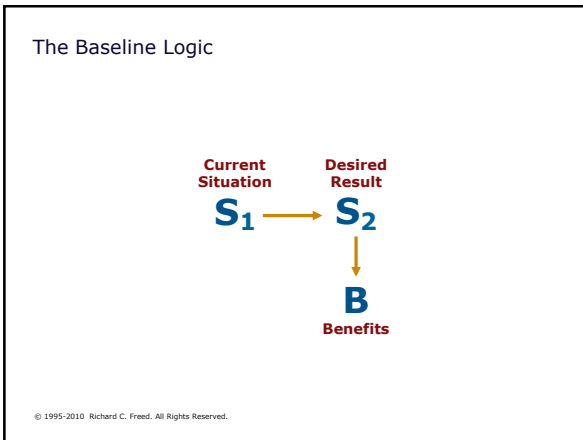


### The baseline logic: The logics

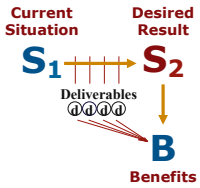
- GENERIC STRUCTURE LOGIC
- ELEMENTS OF THE BASELINE LOGIC
- THE LOGICAL ALIGNMENT OF THOSE ELEMENTS
- THE BASELINE LOGIC AND OUR VALUE PROPOSITION



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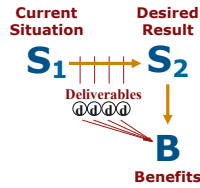
The baseline logic defines three outputs for ensuring reliable communication



1. **Desired Result:** the outcome of the engagement or its phases: insight, a plan, and/or an implemented plan
2. **Deliverables:** the outputs produced during the transition from  $S_1$  to  $S_2$
3. **Benefits:** the good things that accrue to the potential client as/after their desired result is achieved

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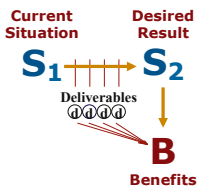
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The baseline logic defines three outputs for ensuring reliable communication



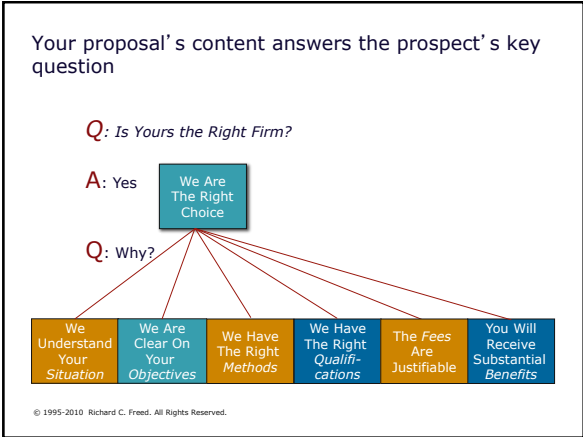
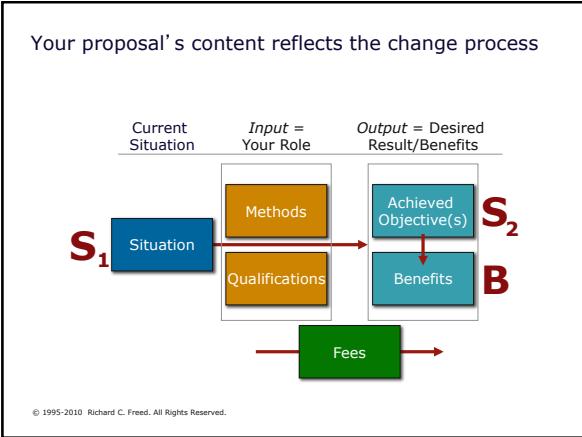
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The baseline logic reflects the engagement process



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This content is reflected in the proposal's six "generic structure slots"

- **Situation:** This is our understanding of your problem (or opportunity).
- **Objectives:** Given that problem (or opportunity), these are our objectives for solving (or realizing) it.
- **Methods:** Given those objectives, these are the methods we will use to achieve them.
- **Qualifications:** Given those methods, these are our qualifications for performing them.
- **Fees:** Given those qualifications and methods, this is how much you should plan to invest.
- **Benefits:** Given our efforts and your investment, these are the benefits or value that you will receive (ROCI).

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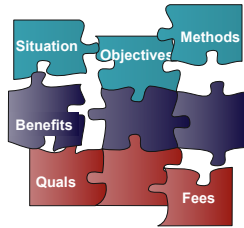
"Generic Structure" is not necessarily related to sequence

- **Situation:** This is our understanding of your problem (or opportunity).
- **Objectives:** Given that problem (or opportunity), these are our objectives for solving (or realizing) it.
- **Methods:** Given those objectives, these are the methods we will use to achieve them.
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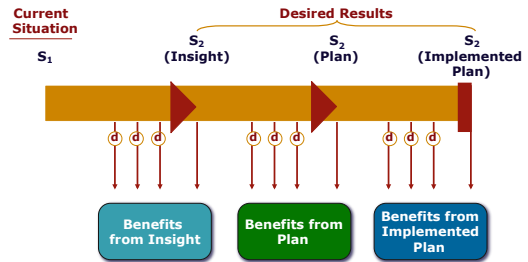
In developing your proposals, think strategically and situationally

- How should the slots be ordered?
- To what extent will they be filled in the document or presentation?
- Which slots, if any, will be sections?



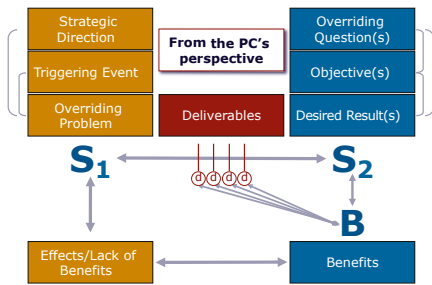
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Benefits accrue *from the process of achieving and from the achievement of* each kind of desired result



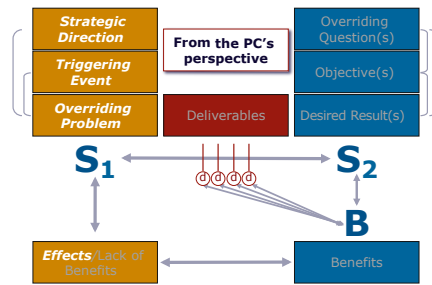
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Baseline Logic: Alignments



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Are the PC's strategic direction, triggering event, overriding problem, and effects aligned?



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### Logics Worksheet: PC Profile


**"How would you characterize the Potential Client?"**

- Major products/markets \_\_\_\_\_
- Annual revenue/profitability/trends \_\_\_\_\_
- Major competitors \_\_\_\_\_
- Market/industry issues \_\_\_\_\_
- **Strategic direction** \_\_\_\_\_
- Experience with your competition \_\_\_\_\_

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### Logics Worksheet: PC's Current Situation (S<sub>1</sub>)


**"What is happening today that the PC would like to change?"**

PC's Triggering Event, Problem And Its Effects  
(Including Lack Of Benefits And Downside Risk Of Doing Nothing)

Triggering Event: \_\_\_\_\_

Single Overriding Problem\*: \_\_\_\_\_

Effects Of Problem: \_\_\_\_\_

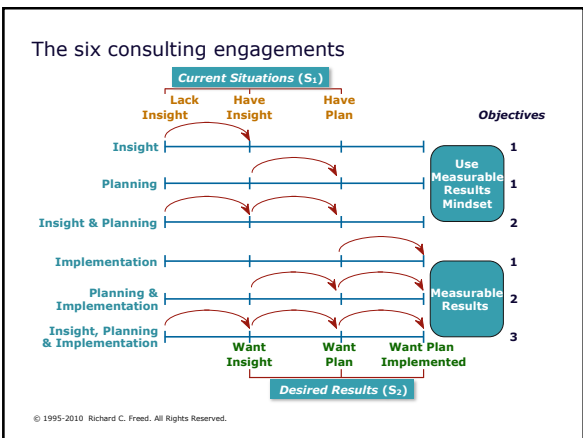
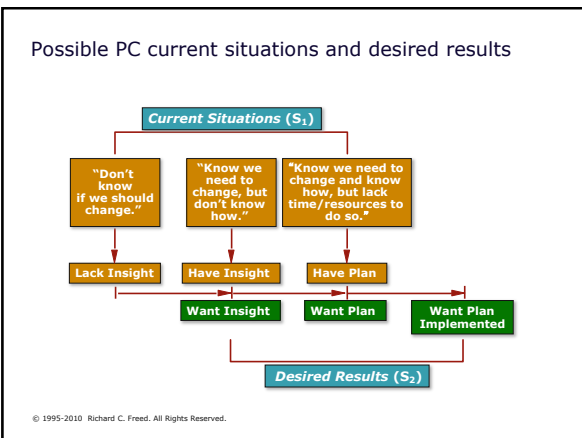
**1. List**

**2. Expand**

**3. Align**

\* Align with the dominant overriding question in Cell 4

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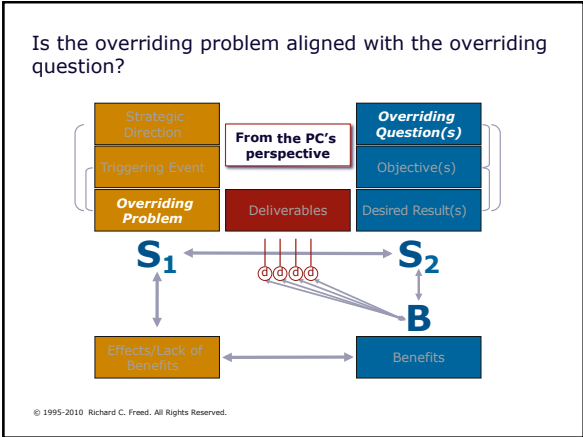
### Logics Worksheet: PC's Perception of Project

"How does the Potential Client perceive their current situation relative to their desired result(s)?"

Type of Project (Circle One)	Current Situation (S <sub>1</sub> )	Number Of Objectives
• Insight	Lack Insight → Have Insight → Have Plan	Measurable Results Mindset: 1
• Planning	→ → →	Measurable Results Mindset: 1
• Insight and Planning	→ → →	Measurable Results Mindset: 2
• Implementation	→ → →	Measurable Results: 1
• Planning and Implementation	→ → →	Measurable Results: 2
• Insight, Planning, and Implementation	→ → →	Measurable Results: 3

Desired Results (S<sub>2</sub>)

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### Logics Worksheet: PC's Overriding Questions

"Given the number of objectives (noted in Cell 3), what overriding question (s) does the PC want answered to improve the current situation?" (List one overriding question per objective)

PC's Single Overriding Insight Question*	PC's Single Overriding Planning Question*	PC's Single Overriding Implementation Objective†
• _____ _____?	• _____ _____?	• _____ _____

\*To state the project objective, rephrase the overriding question, using an active verb  
† Implementation projects have no overriding question

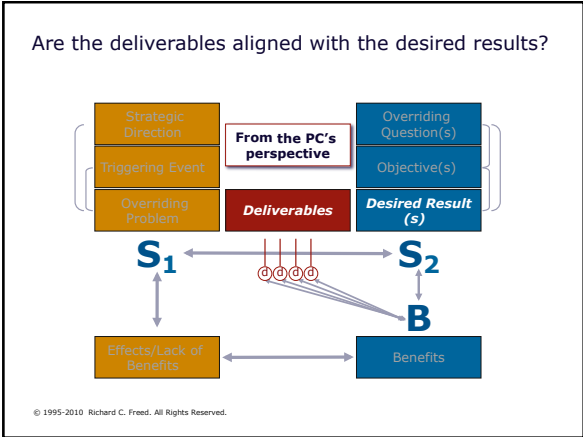
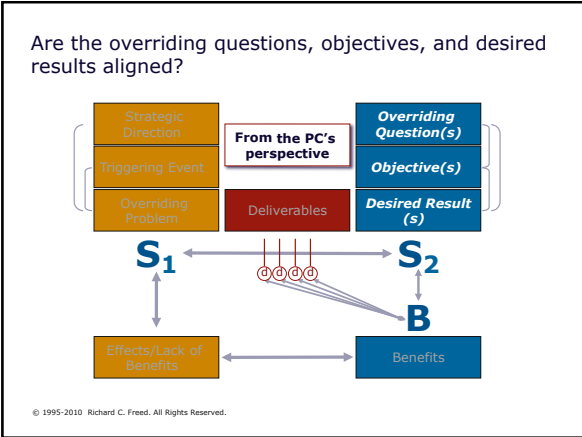
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### Defining the overriding question is crucial

Situation 1	<p>S<sub>2</sub>: A plan to increase internal manufacturing capacity to meet projected product demand</p> <p><b>Overriding Question:</b> How can we increase internal manufacturing capacity to meet projected product demand?</p> <p><b>Engagement Objective:</b> Develop a plan to increase internal manufacturing capacity to meet projected product demand</p>
Situation 2	<p>S<sub>2</sub>: A plan to supply product to meet projected product demand</p> <p><b>Overriding Question:</b> How can we supply product to meet projected product demand?</p> <p><b>Engagement Objective:</b> Develop a plan to supply product to meet projected product demand</p>

The objective(s) depends upon the client's overriding question(s)

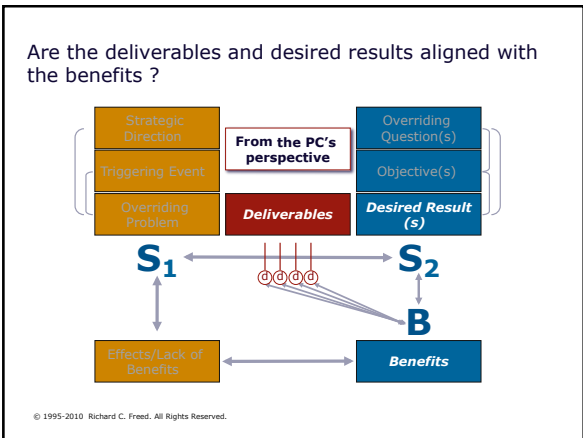
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Logics Worksheet: PC's Desired Results

"What does the PC desire instead of the current situation?"		
PC's Desired <i>Insight</i> Result (To be achieved after Insight Question is answered)	PC's Desired <i>Planning</i> Result (To be achieved after Planning Question is answered)	PC's Desired <i>Implementation</i> Result (Or Measurable Result mindset if not an Implementation Project)
<ul style="list-style-type: none"> <li>Insight/knowledge regarding</li> </ul>	<ul style="list-style-type: none"> <li>A Plan to/for...</li> </ul>	<ul style="list-style-type: none"> <li>An Implemented Plan to/for...</li> </ul>
<b>Deliverables</b> _____ _____ _____ _____ _____	<b>Deliverables</b> _____ _____ _____ _____ _____	<b>Deliverables</b> _____ _____ _____ _____ _____

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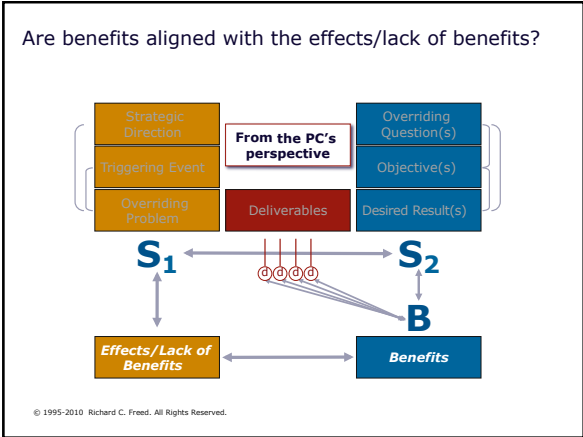


Logics Worksheet: **Expected Benefits (B)**


**"What beneficial effects will accrue to the PC as/after their desired result(s) are achieved?"**

Benefits From Gaining Insight (Non-Measurable)	Benefits From Having A Plan (Non-Measurable)	Benefits From Implemented Plan (Measurable And Non-Measurable)
<div style="border: 1px solid gray; border-radius: 50%; padding: 10px; width: 100px; margin: 0 auto;"> <p style="text-align: center;">1. List</p> <hr/> <p style="text-align: center;">3.Align 2.Expand</p> </div>	<div style="border: 1px solid gray; border-radius: 50%; padding: 10px; width: 100px; margin: 0 auto;"> <p style="text-align: center;">1. List</p> <hr/> <p style="text-align: center;">3.Align 2.Expand</p> </div>	<div style="border: 1px solid gray; border-radius: 50%; padding: 10px; width: 100px; margin: 0 auto;"> <p style="text-align: center;">1. List</p> <hr/> <p style="text-align: center;">3.Align 2.Expand</p> </div>

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What we will cover

Baseline Logic The ("Logics")	Relationships The ("Psychologies")	Message Development
Current Situation	The "Buyers"	Themes
Desired Result	Evaluation Criteria	The Proposal
Deliverables	The Competition	
Benefits		
Value Proposition		

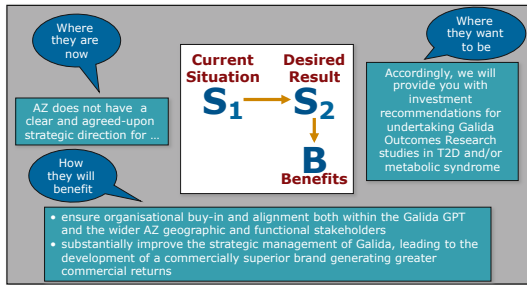
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A value proposition includes at least five elements

- Where they are now ( $S_1$ )
- Where we will take them ( $S_2$ )
- When they will get there (timing)
- How much it will cost (fees)
- How they will benefit (B)

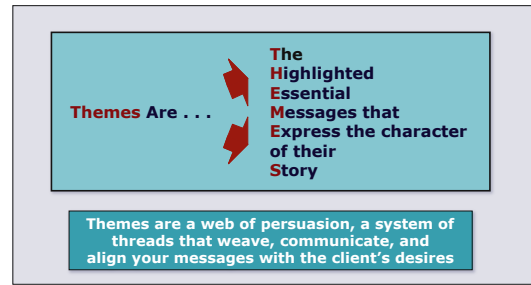
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The Baseline Logic contains three of those elements



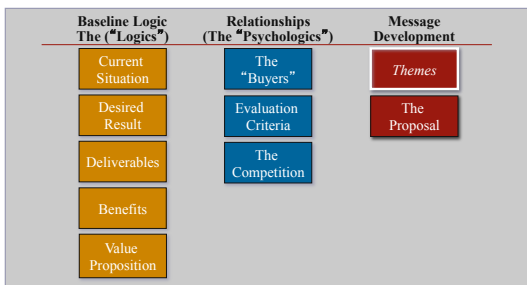
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What themes are



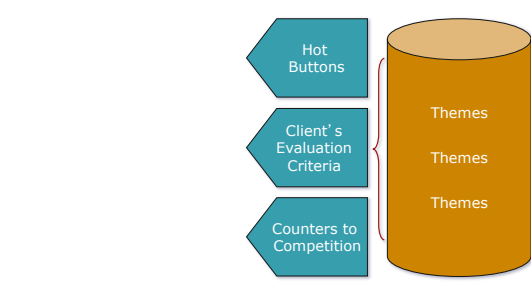
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What we will cover

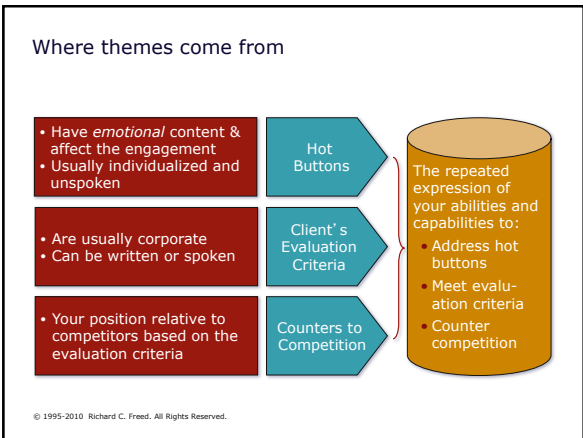
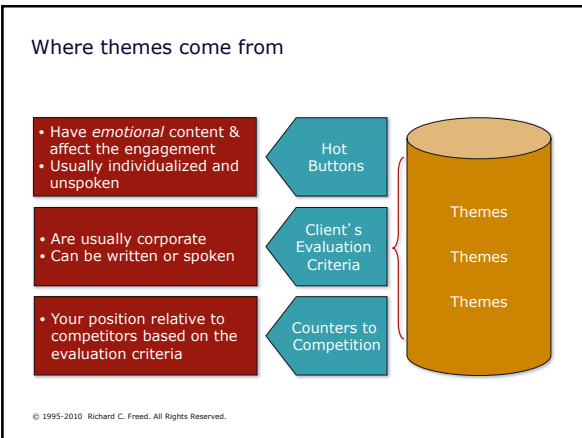
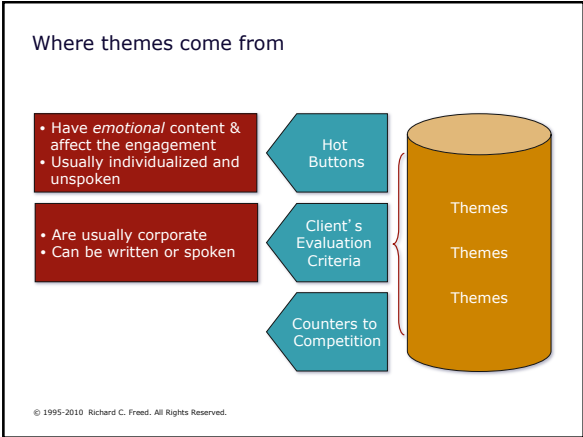
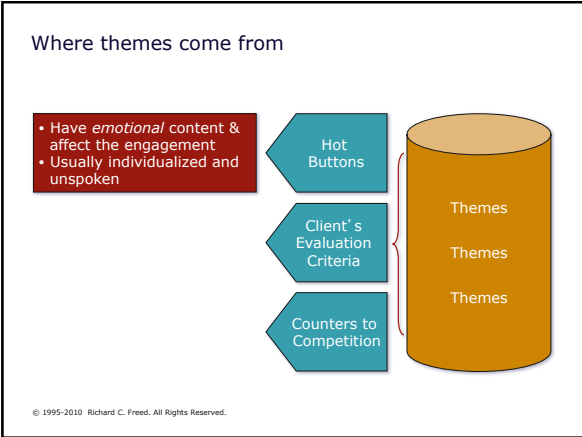


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Where themes come from



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### Psychologics Worksheet: Themes


*"What repeated messages best characterize the PC's story and/or differentiate you?"*

Themes Come From Hot Buttons, Evaluation Criteria, and Counters to the Competition

1	
2	
3	
4	
5	

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### Themes Development Worksheet

Client: \_\_\_\_\_ Today's Date: // /

Customer	Relationship	Criteria	Qualifications	Benefits

**FOCUS:** Answer focused demand will satisfy capacity that can meet customer ability to pay or modify an existing facility, will require a long lead time and need time for production.

**FOCUS:** We will have a proven process for production and delivery quality. In fact, we will provide data to support this claim, which includes a history of quality control and planning for our production process.

**FOCUS:** We will have an excellent, quick-to-ship reputation.

**FOCUS:** We have your reputation brought.

**FOCUS:** We will have your reputation brought.

**FOCUS:** We will have your reputation brought.

**FOCUS:** We will have your reputation brought.

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### What we will cover

Baseline Logic The ("Logics")	Relationships (The "Psychologics")	Message Development
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Deliverables	The Competition	
Benefits		
Value Proposition		

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### Composing the "background" section

- **Situation:** This is our understanding of your problem or opportunity.
- **Objectives:** Given that problem or opportunity, these are our objectives for solving or realizing it.
- **Methods:** Given those objectives, these are the methods we will use to achieve them.
- **Qualifications:** Given those methods, these are our qualifications for performing them.
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- **Benefits:** Given our efforts and your investment, these are the benefits or value that you will receive (ROCI).

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The background section can have three components

Component	
1. Story/S <sub>1</sub>	
2. Questions	
3. Closing/S <sub>2</sub>	

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The Story Component can demonstrate nearly every quality the PC wants in *this* project's consultants

Component	Content
1. Story/S <sub>1</sub>	<ul style="list-style-type: none"> <li>• What is the history, the external and internal factors (including the triggering event), that caused the problem or opportunity?</li> <li>• What is the problem or opportunity?</li> <li>• What are its effects and "lack of benefits"?</li> <li>• What, if anything, has been done to solve the problem or realize the opportunity? Has this attempt exacerbated the situation?</li> </ul> <p>(When possible and appropriate, educate the client about their firm, their market, and our perspective about their situation)</p>
2. Questions	
3. Closing/S <sub>2</sub>	

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Be certain that your Story Component tells a story

*Which opening do you like better. . .*

Mercy is a 200-bed hospital in Chicago, Illinois.

As Mercy grew to become a 200-bed hospital, its business objectives began to change.

*. . . and why?*

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Some goals of the Story/S<sub>1</sub> Component

	To Create And Maintain Interest	To Demonstrate Our Abilities
Story/S <sub>1</sub> Component	✓	✓
Questions Component	✓	✓

The Situation Slot *shows* our qualifications long before the Qualifications Slot tells them

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By rephrasing deliverables as questions, the Questions Component pre-sells your Approach and Methods

Component	Content
1. Story/S <sub>1</sub>	<ul style="list-style-type: none"> <li>What is the history, the external and internal factors (including the triggering event), that caused the problem or opportunity?</li> <li>What is the problem or opportunity?</li> <li>What are its effects and "lack of benefits"?</li> <li>What, if anything, has been done to solve the problem or realize the opportunity? Has this attempt exacerbated the situation?</li> </ul> <p>(When possible and appropriate, educate the client about their firm, their market, and our perspective about their situation)</p>
2. Questions	<ul style="list-style-type: none"> <li>What questions must be answered to solve the client's problem or realize their opportunity? (Derived from deliverables and from themes)</li> </ul>
3. Closing/S <sub>2</sub>	

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Some goals of the Questions Component

	To Create And Maintain Interest	To Demonstrate Our Abilities
Story/S <sub>1</sub> Component	✓	✓
Questions Component	✓	✓

The Situation Slot shows our qualifications long before the Qualifications Slot tells them

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The Closing Component states the engagement's desired result and the benefits of achieving it

Component	Content
1. Story/S <sub>1</sub>	<ul style="list-style-type: none"> <li>What is the history, the external and internal factors (including the triggering event), that caused the problem or opportunity?</li> <li>What is the problem or opportunity?</li> <li>What are its effects and "lack of benefits"?</li> <li>What, if anything, has been done to solve the problem or realize the opportunity? Has this attempt exacerbated the situation?</li> </ul> <p>(When possible and appropriate, educate the client about their firm, their market, and our perspective about their situation)</p>
2. Questions	<ul style="list-style-type: none"> <li>What questions must be answered to solve the client's problem or realize their opportunity? (Derived from deliverables and from themes)</li> </ul>
3. Closing/S <sub>2</sub>	<ul style="list-style-type: none"> <li>Transition from Questions Component</li> <li>Bridge to methods slot</li> <li>Engagement objective(s) (expression of S<sub>2</sub>)</li> <li>Briefly stated benefits</li> </ul>

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To create the Story/S<sub>1</sub> Component, use the "PC Profile" and "PC's Current Situation" cells

Component	Content
1. Story/S <sub>1</sub>	<ul style="list-style-type: none"> <li>What is the history, the external and internal factors (including the triggering event), that caused the problem or opportunity?</li> <li>What is the problem or opportunity?</li> <li>What are its effects and "lack of benefits"?</li> <li>What, if anything, has been done to solve the problem or realize the opportunity? Has this attempt exacerbated the situation?</li> </ul> <p>(When possible and appropriate, educate the client about their firm, their market, and our perspective about their situation)</p>
2. Questions	
3. Closing/S <sub>2</sub>	

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### Logics Worksheet: PC Profile


*"How would you characterize the Potential Client?"*

- Major products/markets:** Large home appliances (refrigerators, ranges, washing machines, etc.).
- Annual revenue/profitability/trends:** Last year's revenue = ??, Highly profitable, though increasing distribution costs (a major component of landed cost) could begin to erode margins. Trends??
- Major competitors:** GE, Whirlpool, Maytag.
- Market/industry issues:** Fairly stable, mature industry, with only modest growth expected next five years. Demand moving to U.S. South and Southwest.
- Strategic direction:** Unknown.
- Experience with your competition:** Has worked with one of our major competitors (name unknown) and with two boutiques, all of which have done good work for ABC and have been asked to bid.

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### Logics Worksheet: PC's Current Situation (S<sub>1</sub>)


*"What is happening today that the PC would like to change?"*

PC's Triggering Event, Problem And Its Effects  
(Including Lack Of Benefits And Downside Risk Of Doing Nothing)

**Triggering Event:** ABC's market forecast

**Single Overriding Problem\*:** Lack of capacity

**Effects Of Problem:**

- Deteriorating delivery performance
  - Declining quality
  - Increased costs resulting from overtime and schedule interruptions to meet "rush" delivery dates
  - Threatened ability to maintain/increase market share
  - Negative impact on bonuses
  - Difficult-to-maintain productivity levels
- Inability to address longer-range, more challenging improvement projects
- Less flexibility for change
- Possible increases in third shift
- Additional maintenance costs
- Employee burnout, lower morale, and lower retention rates
- Increased costs for training new employees

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For the Questions Component, use the "PC's Desired Results" cell, rephrasing the major deliverables

Component	Content
<b>1. Story/S<sub>1</sub></b>	<ul style="list-style-type: none"> <li>What is the history, the external and internal factors (including the triggering event), that caused the problem or opportunity?</li> <li>What is the problem or opportunity?</li> <li>What are its effects and "lack of benefits"?</li> <li>What, if anything, has been done to solve the problem or realize the opportunity? Has this attempt exacerbated the situation?</li> </ul> <p>(When possible and appropriate, educate the client about their firm, their market, and our perspective about their situation)</p>
<b>2. Questions</b>	<ul style="list-style-type: none"> <li>What questions must be answered to solve the client's problem or realize their opportunity? (Derived from deliverables and from themes)</li> </ul>
<b>3. Closing/S<sub>2</sub></b>	

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### Logics Worksheet: PC's Desired Results


*"What does the PC desire instead of the current situation?"*

PC's Desired <i>Insight</i> Result (To be achieved after Insight Question is answered)	PC's Desired <i>Planning</i> Result (To be achieved after Planning Question is answered)	PC's Desired <i>Implementation</i> Result (Or Measurable Result mindset if not an Implementation Project)
<ul style="list-style-type: none"> <li>Insight/knowledge regarding _____</li> </ul>	<ul style="list-style-type: none"> <li>A Plan for increasing capacity to meet the market forecast</li> </ul>	<ul style="list-style-type: none"> <li>An Implemented Plan to/for... _____</li> </ul>
<b>Deliverables</b> _____ _____ _____	<b>Deliverables</b> <ul style="list-style-type: none"> <li>Validated market forecast</li> <li>Validated market share and product mix projections</li> <li>Specified current equipment and space utilization</li> <li>Opportunities to better utilize current equipment and space</li> <li>Make versus buy options</li> <li>Potential factory roles and locations</li> <li>A detailed implementation plan</li> </ul>	<b>Deliverables</b> _____ _____ _____

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For the Closing Component, turn the O/R Question(s) into objective(s), and close with a few solid benefits

Component	Content
1. Story/S <sub>1</sub>	<ul style="list-style-type: none"> <li>What is the history, the external and internal factors (including the triggering event), that caused the problem or opportunity?</li> <li>What is the problem or opportunity?</li> <li>What are its effects and "lack of benefits"?</li> <li>What, if anything, has been done to solve the problem or realize the opportunity? Has this attempt exacerbated the situation?</li> </ul> <p>(When possible and appropriate, educate the client about their firm, their market, and our perspective about their situation)</p>
2. Questions	<ul style="list-style-type: none"> <li>What questions must be answered to solve the client's problem or realize their opportunity? (Derived from deliverables and from themes)</li> </ul>
3. Closing/S <sub>2</sub>	<ul style="list-style-type: none"> <li>Transition from Questions Component</li> <li>Bridge to methods slot</li> <li>Engagement objective(s) (expression of S<sub>2</sub>)</li> <li>Briefly stated benefits</li> </ul>

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### Logics Worksheet: Overriding Questions


"Given the number of objectives (noted in Cell 3), what overriding question (s) does the PC want answered to improve the current situation?" (List one overriding question per objective)

PC's Single Overriding Insight Question*	PC's Single Overriding Planning Question*	PC's Single Overriding Implementation Objective†
<ul style="list-style-type: none"> <li>_____</li> <li>_____?</li> </ul>	<ul style="list-style-type: none"> <li>How best should ABC increase capacity to meet the sales forecast _____?</li> </ul>	<ul style="list-style-type: none"> <li>_____</li> <li>_____</li> <li>_____</li> </ul>
*To state the project objective, rephrase the overriding question, using an active verb		† Implementation projects have no overriding question

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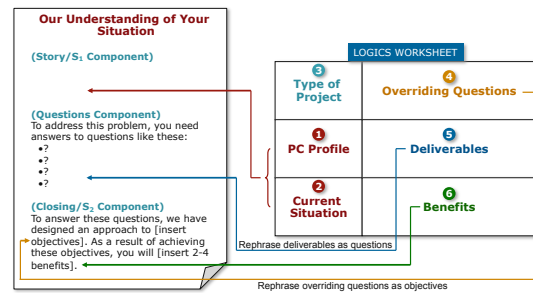
### Logics Worksheet: Expected Benefits (B)


"What beneficial effects will accrue to the PC as/after their desired result(s) are achieved?"

Benefits From Gaining Insight (Non-Measurable)	Benefits From Having A Plan (Non-Measurable)	Benefits From Implemented Plan (Measurable And Non-Measurable)
	<ul style="list-style-type: none"> <li>The right "road map" for providing additional capacity to ensure meeting objectives related to cost, quality, and service</li> <li>An operations strategy that optimizes landed cost and customer service</li> <li>Internal agreement on an expansion plan</li> <li>A convincing, thorough, and credible request to Consolidated</li> </ul>	<ul style="list-style-type: none"> <li>More cost-effective operations</li> <li>Improved product quality</li> <li>Improved service levels</li> <li>Maintained/increased share</li> <li>Continued good reputation of ABC at Consolidated</li> <li>Continued autonomy</li> <li>Increased productivity</li> <li>Protected compensation levels</li> <li>Better flexibility for implementing business and marketing strategies</li> <li>Decreased maintenance costs</li> <li>Higher morale/retention rates</li> <li>Decreased training costs</li> </ul>

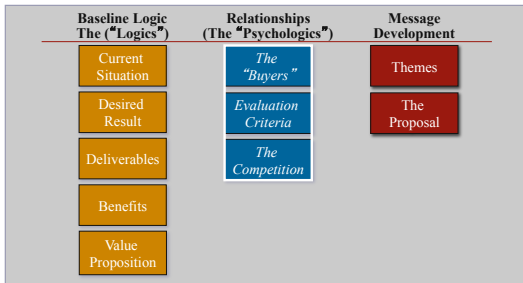
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### Creating the "Our Understanding of Your Situation" section



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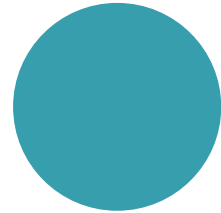
## What we will cover



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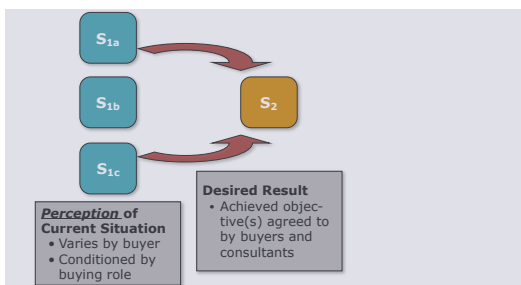
## The psychologies

- THE FIVE BUYING ROLES AND THEIR IMPORTANCE IN DETERMINING...
- INDIVIDUAL BUYER BENEFITS
- HOT BUTTONS AND THE BENEFITS OF ADDRESSING THEM
- RELATIONSHIP MAPS
- EVALUATION CRITERIA
- THE COMPETITION



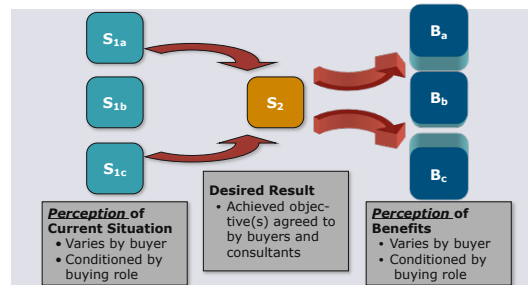
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## Buyers differ in their perception of the current situation and expected benefits



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## Buyers differ in their perception of the current situation and expected benefits



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### Buying influence: Economic

Role	To give final approval to buy	
Characteristics	<ul style="list-style-type: none"> <li>• Has discretionary use of consulting funds</li> <li>• Can release these monies</li> <li>• Has veto power</li> </ul>	
Focus	Concerned with overall impact on organization and bottom line, such as: <ul style="list-style-type: none"> <li>• Strategic position</li> <li>• Competitiveness</li> <li>• Market growth</li> </ul>	<ul style="list-style-type: none"> <li>• Cash flow</li> <li>• Profitability</li> <li>• ROCI</li> <li>• Budget fit</li> <li>• Meeting business goals/objectives</li> </ul>
Number	Only one per sale (but may be one set of people, like a board or a committee)	
Asks: "What will be the overall improvement in performance and eventual return on this consulting investment?"		

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### Buying influence: User

Role	To judge impact on operational performance	
Characteristics	<ul style="list-style-type: none"> <li>• Will be directly affected by this engagement</li> <li>• Will often have a subjective response to proposal</li> <li>• Is very important for continuing relationships</li> </ul>	
Focus	<ul style="list-style-type: none"> <li>• Will be directly affected by this engagement</li> <li>• Will often have a subjective response to proposal</li> <li>• Is very important for continuing relationships</li> </ul>	
Number	Often several	
Asks: "Do the proposed approach and qualifications meet specifications?"		

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### Buying influence: Technical

Role	To screen out	
Characteristics	<ul style="list-style-type: none"> <li>• Acts as gatekeeper</li> <li>• Makes recommendations</li> <li>• Can't say yes; can say no</li> </ul>	
Focus	Concerned with measurable, quantifiable aspects related to this situation, such as: <ul style="list-style-type: none"> <li>– ROI/ROCI</li> <li>– Adequacy of technical solution</li> <li>– Price</li> <li>– Match of specifications</li> </ul>	
Number	Often several	
Asks: "Do the proposed approach and qualifications meet specifications?"		

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### Buying influence: Coach

Role	To act as guide for this sale	
Characteristics	Wants you to win. Therefore, provides/interprets information about the client's environment. E.g.: <ul style="list-style-type: none"> <li>• Situation</li> <li>• Other buyers</li> <li>• Benefits, individual and collective</li> <li>• Evaluation criteria</li> <li>• Competition</li> </ul>	
Focus	Your success with this opportunity	
Number	Develop at least one in the buyer's firm... could be a member of the Board of Directors	
Asks: "How can we pull this off together?"		

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Buying influence: Ratifier

<b>Role</b>	To bless the recommendation of the Economic Buyer
<b>Characteristics</b>	<ul style="list-style-type: none"> <li>• Ratifies the recommendation</li> <li>• Acts as gatekeeper</li> <li>• Often at the highest levels of the organization</li> <li>• Has veto power</li> </ul>
<b>Focus</b>	Concerned with total resource availability/allocation as well as potential cultural/environmental conflicts in the organization. For example, conflicts with: <ul style="list-style-type: none"> <li>–Other programs</li> <li>–Constituencies</li> <li>–Colleagues</li> <li>–Corporate culture</li> </ul>
<b>Number</b>	If exists, usually only one in corporate organizations; sometimes several in governmental organizations
Asks: "Will this proposed effort and this consulting firm support my broader 'political' and/or personal objectives?"	

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Psychologics Worksheet: Individual Buyers' Titles, Roles, and Benefits

*"What benefits will accrue to each buyer as/after the desired result(s) are achieved?"*

Buyer/Title	Buyer Role(s)					Based upon their respective roles, each buyer's	
	E	U	T	C	R	Benefits from Insight or Plan	Benefits from Implementation*
1							
2							
3							
4							
5							

\*If proposed project does not involve implementation, use measurable-results orientation to indicate measurable benefits buyer could achieve subsequent to implementation

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Psychologics Worksheet: Hot Buttons

*"What desires or concerns of each buyer must be addressed?"*

Buyer's Hot Buttons*	How Addressed	PC	M	PO	Benefits to Each Buyer From Addressing His/Her Hot Buttons
1					
2					
3					
4					
5					

**\*Hot Button:** Process-related desire or concern of a buyer that will affect your PC approach (PC), project's methodology (M) and/or project organization (PO)—often personal, having emotional rather than technical content. Use **single words or short phrases** such as:  
 Thorough, balanced or flexible approach | Fear of change | Project complexity | Creativity | Involvement  
 Urgency (e.g., to get quick results) | Objectivity | Teaching/training | Control | Sensitivity to

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Psychologics Worksheet: Buyer Receptivity

*"How receptive is each buyer to your efforts to date?"*

	Power Base			Receptivity			Rationale For Your Ratings
	L	M	H	--	-	+	
1							
2							
3							
4							
5							

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Psychologics Worksheet: **Evaluation Process/Criteria**

"What process/criteria will the buying committee use, collectively?"		
"What is the PC's budget for this project?"		
"How will the selection decision be made?"		
"What collective evaluation criteria will be used?"	Knockout	Relative Weighting
1		
2		
3		
4		
5		
		100%

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Psychologics Worksheet: **Competition**

"Based upon the evaluation criteria, how does the prospect compare you with competitors?"		
Competitors	Considering the PC's Evaluation Criteria for <b>This Opportunity</b>	
	Competitors' Strengths	Competitors' Weaknesses
• In-house/Other Initiatives		
•		
•		
	Your Strengths	Your Weaknesses
• You		
"How might you counter competitors' strengths or exploit their weaknesses?"	"How might competitors counter your strengths, exploit your weaknesses, or redefine the overriding question?"	
•	•	
•	•	
•	•	

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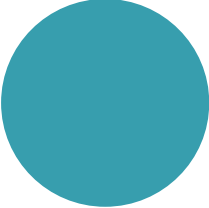
Composing the methods slot

- **Situation:** This is our understanding of your problem (or opportunity).
- **Objectives:** Given that problem or opportunity, these are our objectives for solving or realizing it.
- **Methods:** Given those objectives, these are the methods we will use to achieve them.
- **Qualifications:** Given those methods, these are our qualifications for performing them.
- **Fees:** Given those qualifications and methods, this is how much you should plan to invest.
- **Benefits:** Given our efforts and your investment, these are the benefits or value that you will receive (ROCI).

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The methods slot

- **COMPOSING THE INTRODUCTION**
- **COMPOSING THE BODY**



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When three slots exist, which are the most important?

Potential Client: "Congratulations! You're one of three finalists and the first to whom I've spoken. Would you like to present first, second, or third?"

Which do you choose? 1st  2nd  3rd

Potential Client: "Congratulations! You're one of three finalists and the second to whom I've spoken. Because the third slot's taken, would you like to present first or second?"

Which do you choose? 1st  2nd

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Consider this scenario:

We are proposing an engagement to The ABC Company, a division of Consolidated Industries

The engagement's success will depend upon a valid market forecast

ABC's VP Marketing is confident in the forecast

We believe that the forecast must be validated; the VP does not

We have included validation as one of the tasks in our proposed approach

Two of the buyers' hot buttons are "rigor" and "thoroughness"

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Persuasion goes in the 1<sup>st</sup> and 3<sup>rd</sup> slots; information, in the middle

Good Reason	<div style="font-size: 2em; font-weight: bold; color: #800000; margin-bottom: 10px;">P</div> <p>"Because your market is changing rapidly,</p>	Opening P-Slot: Explains <i>Why</i>
Action	<div style="font-size: 2em; font-weight: bold; color: #800000; margin-bottom: 10px;">I</div> <p>we will jointly update the existing market forecast.</p>	I-Slot: Explains <i>How</i>
Result/ Benefit	<p>By having the market forecast updated jointly with an outside party, your firm will help convince your parent company that the project is rigorous and current."</p>	Closing P-Slot: Explains <i>What Results</i>

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PIP at the task level

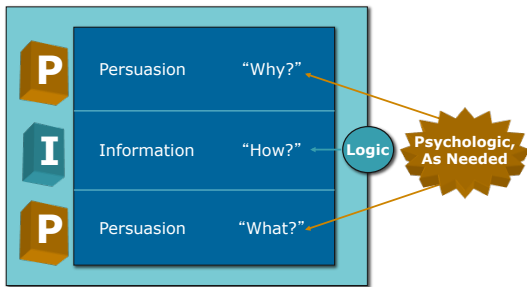
**Task 5: Develop A Plan To Implement The Selected Option**

**I-Slot: ("How?")**

- Define the tasks necessary to implement the selected option
- Define the necessary resources and responsibilities
- Develop a critical path required to complete all tasks

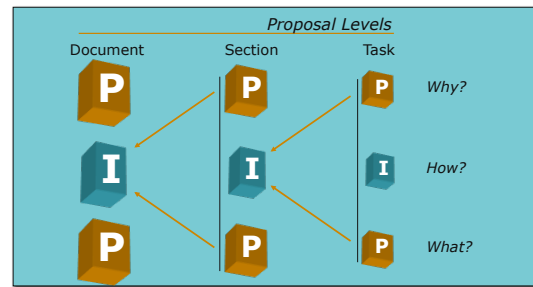
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The information (I-Slot) is necessary  
but not always sufficient



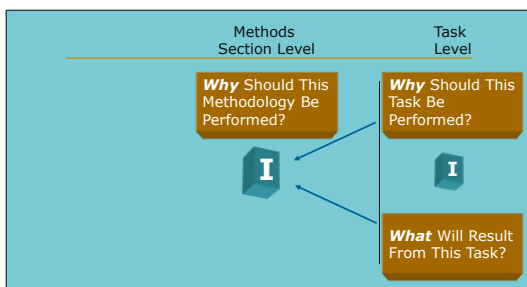
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PIP works on several levels



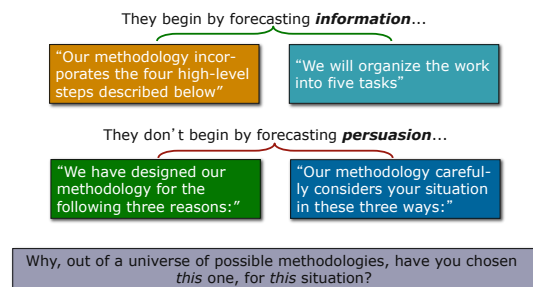
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Each P-Slot answers a specific question at each level



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Methods sections usually begin unstrategically, by explaining "How" rather than "Why"



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To create the opening P-Slot of “Approach and Methods,” use TDW’s Situation and Methods columns

**Approach and Methods**

We have designed our approach for three important reasons:

- Because [of something in your current situation], you need [something related to this theme]. Therefore, we will [do something related to that theme].
- Because [of something in your current situation], you need [something related to this theme]. Therefore, we will [do something related to that theme].
- Because [of something in your current situation], you need [something related to this theme]. Therefore, we will [do something related to that theme].

Specifically, our methods include the following major tasks:

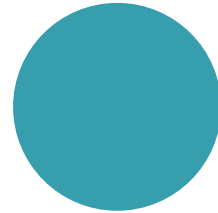
THEMES DEVELOPMENT WORKSHEET				
Theme	Sit.	Meth.	Quals.	Benes.
1	Because... you need...	Therefore, we will...		
2	Because... you need...	Therefore, we will...		
3	Because... you need...	Therefore, we will...		

Chosen from mid- and high- powerbase buyers’ hot buttons, PCs eval. crit., and counters to our competition

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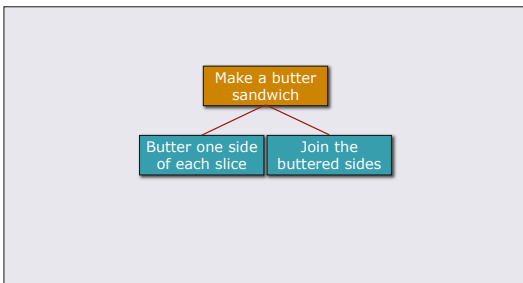
The methods slot

- COMPOSING THE INTRODUCTION
- COMPOSING THE BODY



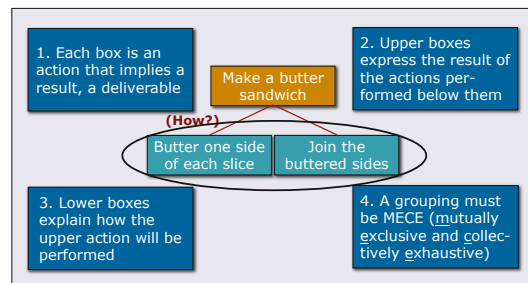
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Why would you perform these two actions?



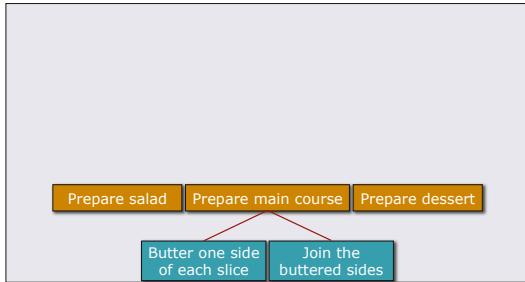
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“How”-logic trees express four principles



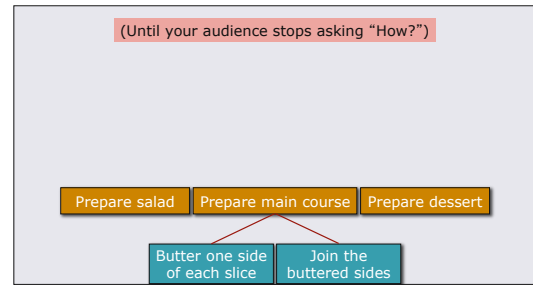
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Let's assume your butter sandwich is the main course of a three-course meal



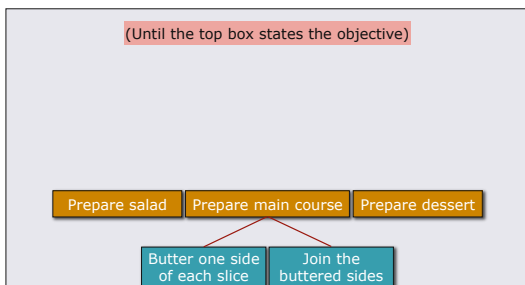
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How far *down* to you build?



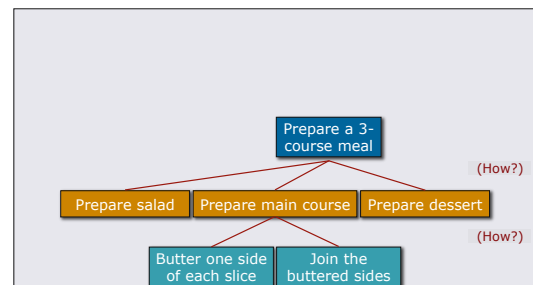
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How far *up* do you build?



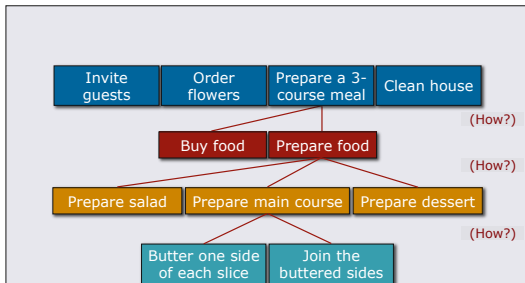
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(We're building...)



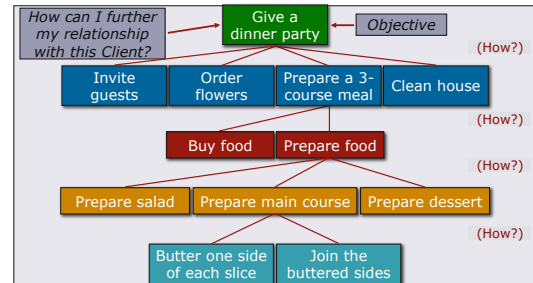
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(...and building)



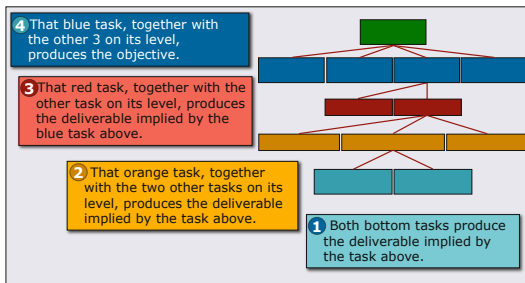
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Your objective is the answer to the audience's overriding question



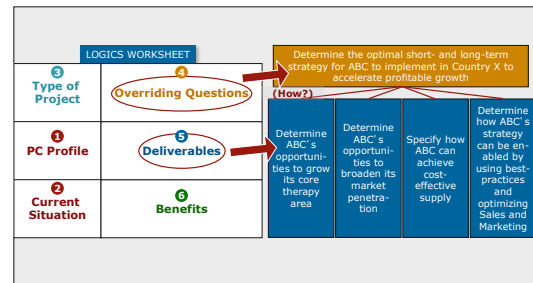
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Every task, on every level, contributes to achieving the objective



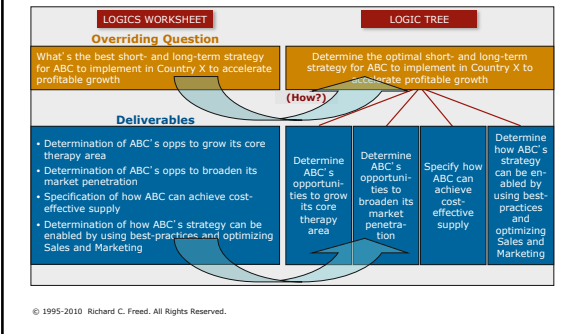
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In practice, you'll build the logic tree for your methods from the top down, using your Logics Worksheet

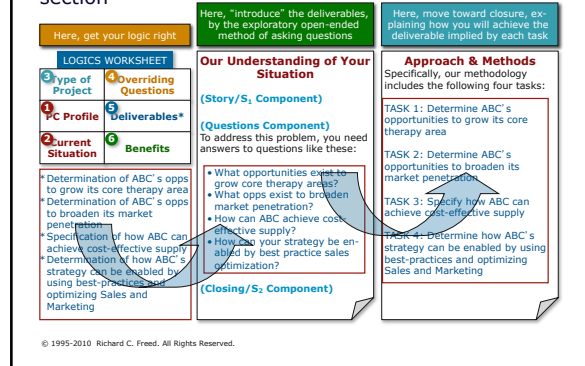


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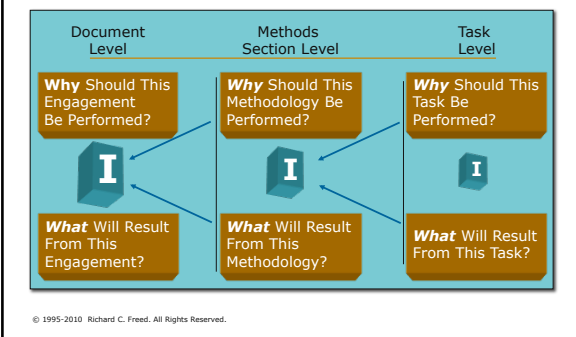
In practice, you'll build the logic tree for your methods from the top down, using your worksheet (cont.)



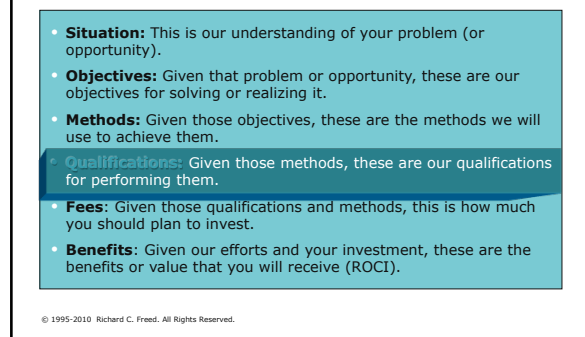
Creating the body of the "Approach & Methods" section



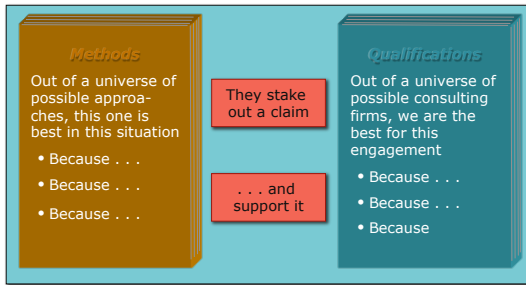
Each P-Slot answers a specific question at each level



Composing the qualifications slot



### The Methods and Qualifications Slots are arguments



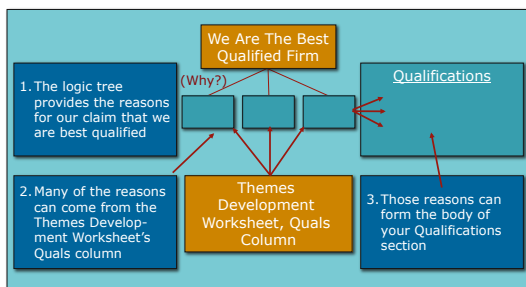
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### The Qualifications Slot answers “Why?” by providing good reasons



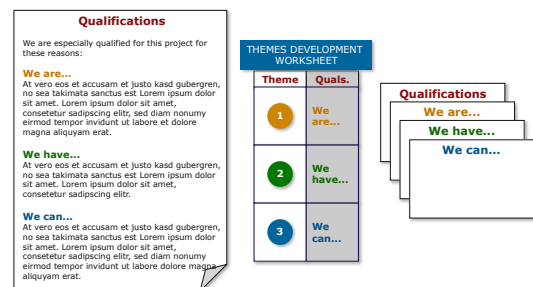
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### Preparing the Qualifications Section



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### Creating the major claims for the qualifications section



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### Composing the fees slot

- **Situation:** This is our understanding of your problem (or opportunity).
- **Objectives:** Given that problem or opportunity, these are our objectives for solving or realizing it.
- **Methods:** Given those objectives, these are the methods we will use to achieve them.
- **Qualifications:** Given those methods, these are our qualifications for performing them.
- **Fees:** Given those qualifications and methods, this is how much you should plan to invest.
- **Benefits:** Given our efforts and your investment, these are the benefits or value that you will receive (ROCI).

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### Composing the benefits slot

- **Situation:** This is our understanding of your problem (or opportunity).
- **Objectives:** Given that problem or opportunity, these are our objectives for solving or realizing it.
- **Methods:** Given those objectives, these are the methods we will use to achieve them.
- **Qualifications:** Given those methods, these are our qualifications for performing them.
- **Fees:** Given those qualifications and methods, this is how much you should plan to invest.
- **Benefits:** Given our efforts and your investment, these are the benefits or value that you will receive (ROCI).

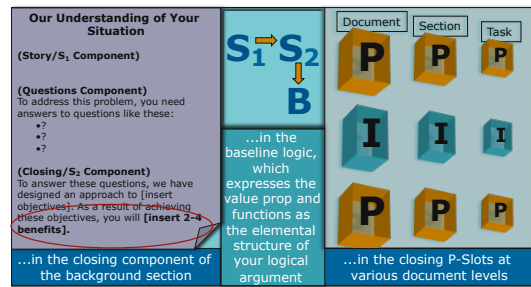
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### 1. Just how important are benefits?



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### The Benefit Slot exists throughout the proposal



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### Which section could be best for ending the proposal?

**Timing & Costs**

- Provides a dry and unpersuasive close (unless you're the low bidder)

**Qualifications**

- Consultant-facing
- Focuses on you

**Expected Benefits**

- Client-facing
- Focuses on the good things that will accrue to the PC during and after the engagement

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### Creating the "Expected Benefits" section

**Expected Benefits**

We are especially qualified for this project for these reasons:

**You will know how...**  
At vero eos et accusam et justo kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat.

**You will be able to...**  
At vero eos et accusam et justo kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet, consetetur sadipscing elitr.

**Your Mgmt team will have an agreed-to roadmap for...**  
At vero eos et accusam et justo kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam dolore magna aliquyam erat.

**LOGICS WORKSHEET**

<b>Benefits</b>	

**PSYCHOLOGICS WORKSHEET**

<small>Indiv. Buyer Bases</small>	<small>Hot Button Bases</small>

**THEMES DEVELOPMENT WORKSHEET**

<b>Theme</b>	<b>Benes.</b>
1	You will know how...
2	You'll be able to...
3	You'll have agreement on...

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### Creating the desired perception through words

For our results to adequately represent the wishes of the employees, 65% of the questionnaires should be returned. Because we have not yet received that percent of return, we are now calling employees to make sure they have received the questionnaire and to remind them to return it as soon as possible. This additional prodding should provide us the 65% minimum by next Monday, three days later than we had originally planned.

**Even though we will receive some responses later than our original deadline, we are now tallying those responses already received. Thus, when additional responses trickle in, we can simply integrate that data into what we have already compiled.**

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### Creating the desired perception through words

Even though we will ~~receive~~ **collect** some responses later than our original deadline, we are now **already** ~~analyzing~~ **tallying** those responses ~~already~~ received. Thus, **just as soon as** ~~when~~ **additional** the remaining responses ~~trickle in~~ **arrive**, we can ~~simply~~ **will** **immediately** integrate that data into what we have already compiled.

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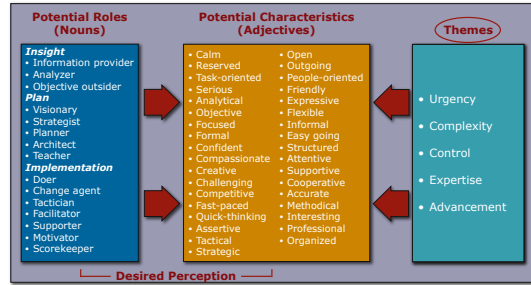
Creating the desired perception through words

“What adjectives would you like your potential client to use in describing you and your team?”

Aristotle: “ethos”—the projection of the character of the rhetor (speaker)

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How do we want the pursuit team to be perceived?



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