Logics Worksheet "Where are you in the business development process?" Red Flag: missing or unverified information, uncertainties, Today's Proposal Already Submitted Proposal Due Soon hypotheses, or vulnerabilities. Date: Potential Client (PC): "Given the number of objectives (noted in Cell 3), what overriding question(s) does the PC want answered to improve their current situation?" (List one overriding question per objective.) 3) PC's Perception of Project 4) PC's Overriding Questions Type of Project (Circle One) Number of Objectives PC's Single Overriding Insight Question* PC's Single Overriding Planning Question* PC's Single Overriding Implementation Objective Lack Insight Have Insight Have Plan Insight Measurable Planning Results Orientation Insight and *To state the project objective, rephrase † Implementation projects Planning the overriding question, using an active verb have no overriding question Implementation 5) PC's Desired Results (S₂) "What does the PC desire instead of the current situation" Planning and Results Implementation • Insight, Planning, PC's Single Insight Result PC's Single Desired *Planning* Result PC's Desired Measurable Result after Implementation Want Insight Want Plan Want Plan (Or Measurable-Results Orientation if not an Implementation Project) and Implementation (To be achieved after Insight Question is answered) (To be achieved after Planning Question is answered) Implemented ☐ Conceptual Desired Results (S₂) A ☐ Detailed Plan to/for... An Implemented Plan to/for. Insight/knowledge regarding. "How would you characterize the Potential Client?" 1) PC Profile Deliverables Deliverables Deliverables · Major products/markets Annual revenue/profitability/ · Major competitors (Desired Result) · Market/industry issues Strategic direction • Experience with your firm and other consultants "What is happening today that the PC would like to change?" "What benefits will accrue to the PC as/after their desired result(s) are achieved?" 6) PC's Expected Benefits (B) 2) PC's Current Situation (S₁) PC's Triggering Event, Problem, and Its Effects (including Lack Of Benefits and Downside Risk Of Doing Nothing) PC's Benefits From <u>Implemented Plan</u> (Measurable And Non-Measurable) PC's Benefits From Gaining Insight PC's Benefits From Having a Plan (Non-Measurable) (Non-Measurable) ■ Triggering Event: Single Overriding 1) List 1) List 1) List Effects Of Problem. (Current Situation) 3) Align 3) Align 2) Expand 3) Align 2) Expand (Benefits) 3) Align 2) Expan * Align with the dominant overriding question in Cell 4 Note: Complete this cell for all projects to reflect a Measurable Results Orientation Expand Challenge yourself to identify potential effects, and Align relevant effects with benefits. Align and vice versa effects of those effects, in Cells 2 and 6 Align

Psychologics Worksheet

Potential Client:								Proposal Team:						oday ate:	's //	-	Red I	lag i nerabilit	missin ties.	g or un	verified	information, uncertaintie	es, hypotheses,
1) Individual Buyer Benefits				"What benefits will accrue to ea <u>ch bu</u> yer as/after the desired result(s) are achieved?"				2) Hot Buttons		s or concerns of each buyer must b during the PC process and/or e			addres ageme	ssed ent?"	3) Buyer Receptivity "How receptive is each buyer to our PC efforts to date?"								
Buyer/Title	Buyer E U			Benefi	Based its fr <u>om <i>In</i></u>	•		spective roles, each buyer's Benefits from Implemented Plan **	•	Buyer's Buttor	Hot ns*	How Addressed	PC M	РО	Benefits to Each Addressing His/H	Buyer er Hot E	from Buttons				r Rating		Buyer Rating
2 3 4 5								professional							Priva	oni	al						
4) PC Evaluation "What Process/Criteria "What is the PC's budget "How will the consultant-se "What collective criteria"	use, collifor this preceded ection de	oject?'	ly, to se	the buying elect the co	onsultant?	e \\\\\		If project does not involve implementation, use MR mindset to indicate measurable benefits that obe achieved after implementation "What repeated messa the PC's story and Themes Come from Hot Button Criteria, and Counters to the incidence of the project of the incidence of the project of th	ages bes	 emotional ration Thorough, in Urgency (extra characterize rentiate you?" 	her than te integrated,	ncern of a buyer that will affectchnical content. Use single with balanced, or flexible approach quick results) 5) Competition Competitors	ords or sho	rt phra •	ases such as: Creativity Control "Based up	on the e	Fear o Projec	f changet completion crite	exity eria, ho	ow does	• Obje • Sen s the PC	ectivity • Inv	volvement aching/training petitors?"
1 2 3 4 5						- - - -	3 4	1 2 3 4				Other Projects In-house Your Firm			Your Streng		"Low r	night vo		nter con	nnotitor	Your Weaknesses	
7) Summary of Your Current P	osition	engths		ere are you	100%) Potei Strer	ential Actions to Leverage Your ngths or to Eliminate Red Flags				"What can you do to improve			position?"		"How n		mpetiti	ion cou	nter voi	ur strenaths. exploit vou	
	Red Flag	gs 🏲														9		Proposa	al Strat			"What should you o proba When	to to improve your ability of winning?" Who

Themes Development Worksheet

Today's Date: / / Potential Client:

"What repeated messages best characterize the PC's story and/ or differentiate you ?"	"Given the current situation (S ₁), 2) Situation what do the buyers nee <u>d during</u> this project related to this theme?"	"Given this need, how have you designed 3) Methods your methodology and/or project organization to meet it?"	"Given those methods, how are 4) Qualifications you qualified to perform them related to that need?"	"Given those methods and 5) Benefits qualifications, how will the buyers benefit by your meeting that need?"				
List from Cell 6 on the Psychologics Worksheet Source* HB EC CC	Express as <u>PC Needs</u> (Focus on the PC)	which will be met by you (Focus on you) M* PO*	State as good reasonsas propositions or claims (Focus on you)	State as good reasons (Focus on the PC) E* N*				
1	Because	Therefore, we will						
	you need							
2	Because	Therefore, we will						
	you need							
3	Because	Therefore, we will						
	you need							
4	Because	Therefore, we will						
	you need							
5	Because	Therefore, we will						
	you need							
* HB = Hot Button; EC = Evaluation Criteria; CC = Counters to the Competition		* M = Methodology; PO = Project Organization		* E = Existing Benefit; N = Newly Identified Benefit				
BETTER EXAMPLE	Recause forecasted demand will outstrip	• Therefore we will have frequent progress reviews	We are able to commit our project team.	By our beginning and concluding this engagement				

Urgency

- Therefore, we will have frequent progress reviews so that top management is aware of preliminary conclusions and direction quickly. In fact, we will involve them in preparing the final report, which will actually be your proposal to Corporate, thus Therefore, we will have frequent progress reviews so that top management is aware of preliminary conclusions and direction quickly. In fact, we will eliminating one step in your decision-making process.
- immediately after your approval to proceed. This team will have the practical experience necessary to work together with your management to jointly develop and execute a work plan that will minimize the study's elapsed time.
- quickly, *you* will have more time for detailed and implementation, thus allowing more time to design a more comprehensive plan for maintaining customer service during the transition.

POOR EXAMPLE

• Urgency

- Your problem requires an urgent solution.
- We will focus on short-term, quick-fix opportunities.
- We know your organization thoroughly.
- You will get information quickly, to make a timely decision.