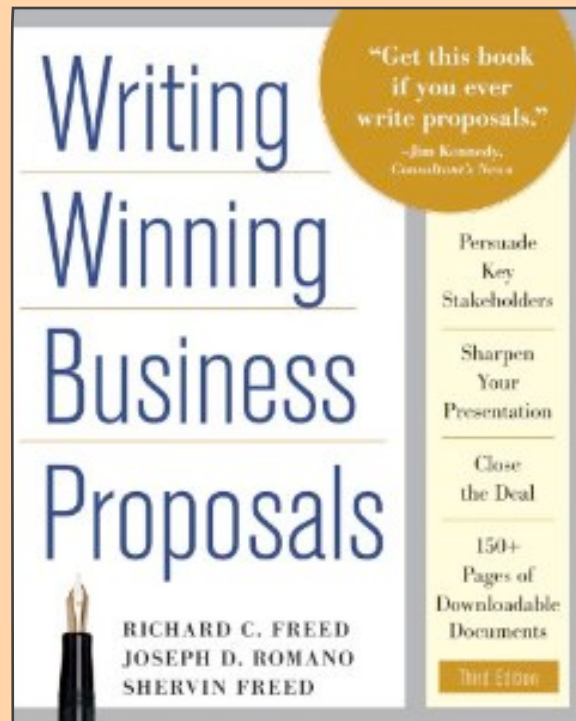


Worksheets Handbook

*Information and Strategies for Completing the Logics,
Psychologics, and Themes Development Worksheets*

Richard C. Freed



For Readers of *Writing Winning Business Proposals*

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Completing the Logics Worksheet

Prospect Profile (Cell 1)

Strategies/Key Points to Remember/Key Points to Remember

- As throughout all the worksheets, flag any missing or unverified information, uncertainties, hypotheses, or vulnerabilities.
- **Strategic direction:** Consider the strategic direction of the unit(s) to which you are selling and to which the proposal will need to go if there are levels of approval. Every level, however, will be influenced by the unit's and/or the firm's strategic direction—for example, the 3-5 year plan, the goals or objectives of which the firm hopes to achieve. These might include the major initiatives of the executive team expected to create significant shareholder value. These initiatives usually focus on growing profitably, improving cost position, focusing on core businesses, and improving brand/customer management.
- **Prospect's experience with your competition:** If, for example, yours is a global firm, consider the prospect's experience with any of your offices worldwide, not just your office, region, or practice.

Prospect's Current Situation (Cell 2)

Definitions

- **Triggering event:** That specific event that brought to the prospect's awareness the existence of their single overriding problem/opportunity.
- **Single overriding problem:**
 - ✓ **In an Insight engagement,** the problem (or opportunity) the prospect wishes to define within the proposed engagement
 - ✓ **In a Planning engagement,** the problem the prospect wants a plan to solve (or the opportunity the prospect wants a plan to capitalize on)
 - ✓ **In an Implementation engagement,** the problem (or opportunity) the prospect wants solved (or capitalized on)
- **Effects of the overriding problem:** Further problems directly caused by the overriding problem. These are always part of the "problem bundle," the causal chain linking triggering event, overriding problem, and effects. Further effects can often be determined or hypothesized by asking what is the possible "effect of the effect."
- **Lack of benefits:** Problematic aspects of the current situation not directly caused by the overriding problem. They exist as an absence of benefits because the problem has not yet been addressed or solved.

Strategies/Key Points to Remember

- ✓ **About the overriding problem:**
 - ➔ Be certain to phrase the overriding problem as a problem, not (for example) as a question.
 - ➔ Be certain to phrase the overriding problem/opportunity from the prospect's perspective. That is, begin your thinking by describing the prospect's point of view.
 - ➔ Attempt to pursue those problems/opportunities aligned with the prospect's strategic direction. Therefore, red flag the overriding problem if it's not aligned with the prospect's strategic direction (or the triggering event).
 - ➔ Use a red flag to indicate if one buyer's point of view of the overriding problem differs from that of other buyers, if one of your team member's point of view differs from that of other members, or if your team's point of view differs from the buyers.
- ✓ **About effects of the overriding problem:**

- ➔ Keep challenging yourself by asking, “What is the effect of this effect?” Any effect generated in this manner should be red flagged if you are uncertain of its existence.
- ➔ Red flag any effect that cannot now but could later be quantified, either through your own research or through discussions with the prospect.
- ✓ **About lack of benefits:** Assume, for example, that the overriding problem is an imminent shortfall in manufacturing capacity. Although the prospect's management team might not agree on how precisely to address that shortfall, “lack of consensus” would not be a direct effect of the overriding problem but might nevertheless be a problematic aspect of the current situation that the prospect would like to change. Lack of benefits are usually generated by aligning S1 and B.

Prospect's Perception of Project (Cell 3)

Definitions

- **Decision point:** That point between insight and planning or between planning and implementation at which the prospect must decide whether the study should stop or continue or should be significantly redirected.
- **Measurable Results:** Quantifiable, measurable impacts on the client's business processes. Measurable results are usually realized only upon implementation.
- **Measurable Results Mindset:** A focus on measurable results, even in projects that by definition cannot achieve such results.

Strategies/Key Points to Remember

- ✓ Any combination engagement (for example, insight and planning) may contain a go/no-go decision point or at least a major decision point between the phases.
- ✓ Remember the difference between a planning engagement and an insight/planning engagement. In the former, the prospect is asking only one overriding question. In the latter, the prospect is asking two overriding questions, and the prospect may be at a major decision point after the first one is answered, a decision point that could terminate the project.
- ✓ The focus should be on the prospect's point of view unless this is a proactive (self-initiated) lead, in which case everything could be from your point of view.

Prospect's Overriding Questions (Cell 4)

Definitions

- **Overriding Questions:** The highest-level questions this proposed engagement will answer. The number of overriding questions depends upon the type of engagement.

Strategies/Key Points to Remember

- ✓ Be certain to phrase the question or questions from the prospect's perspective. That is, begin your thinking by defining the prospect's point of view.
- ✓ Attempt to answer those overriding questions aligned with the prospect's strategic direction. Therefore, red flag the overriding questions if they are not aligned with the prospect's strategic direction (or the triggering event).
- ✓ Use a red flag to indicate if one buyer's point of view of the overriding questions differs from that of other buyers, if one of your team member's point of view differs from that of other members, or if your team's point of view differs from the buyers.
- ✓ Recognize that defining an overriding question is crucial because the engagement's objective directly expresses it (and therefore your engagement's methodology will be designed to achieve it). A red flag on the overriding question or questions is indicative of a major discrepancy that should have the highest priority for resolution. Red flags on both the overriding problem and overriding questions should be considered "blood-red" flags. Everything else on the LOGICS WORKSHEET is suspect if these two elements are flagged.
- **N.B.:** An implementation engagement has an objective but not an overriding question. (See below: "Relationship of Overriding Questions and Objectives.")
 - ✓ To state the engagement objective, rephrase the overriding question using an active verb in insight and planning engagements. For example: If the overriding planning question is "How best should we reduce manufacturing costs?" the planning objective is "To develop a plan to reduce manufacturing costs."

Relationship of Overriding Questions and Objectives

Single-Type Engagements

Single-type engagements have only one overriding question and/or objective. An insight engagement has only one overriding question (e.g., “What opportunities exist in the Asia-Pacific market?”). A planning engagement has only one overriding question (e.g., “How best can we enter the Asia-Pacific market?”). The exception is that an implementation engagement has no overriding question, only an objective:

Engagement Type	Overriding Question	Objective
INSIGHT	<ul style="list-style-type: none"> • What opportunities exist in Asia/ Pacific? 	<ul style="list-style-type: none"> • Determine the opportunities in Asia/Pacific.
PLANNING	<ul style="list-style-type: none"> • How best can we enter Asia/ Pacific? 	<ul style="list-style-type: none"> • Develop a plan for entering Asia/ Pacific.
IMPLEMENTATION	<ul style="list-style-type: none"> • (none) 	<ul style="list-style-type: none"> • Enter the Asia/Pacific market.

Combination Engagements

In a combination engagement (e.g., insight and planning), there will be multiple overriding questions and objectives. Because there is often a go/no-go decision point or at least a major decision point between the two phases, the planning question must often express that decision, as in some of the examples below.

Engagement Type	Overriding Question	Objective
INSIGHT & PLANNING	<ul style="list-style-type: none"> • What opportunities exist in Asia/Pacific? • Given those opportunities, how best can we enter Asia/Pacific? 	<ul style="list-style-type: none"> • Determine the opportunities in Asia/Pacific. • Given those opportunities, develop a plan for entering Asia/Pacific.
PLANNING & IMPLEMENTATION	<ul style="list-style-type: none"> • How best can we enter Asia/Pacific? 	<ul style="list-style-type: none"> • Develop plan for entering Asia/Pacific • Enter the Asia/Pacific market
INSIGHT, PLANNING, & IMPLEMENTATION	<ul style="list-style-type: none"> • What opportunities exist in Asia/Pacific? • Given those opportunities, how best can we enter Asia/Pacific? • (none) 	<ul style="list-style-type: none"> • Determine the opportunities in Asia/Pacific. • Given those opportunities, develop a plan for entering Asia/Pacific. • Enter the Asia/Pacific market.

Prospect's Desired Results and Deliverables (Cell 5)

Definitions

- **Desired results (S2):** The end products—insight, plan and/or implemented plan—of the engagement or of phases of the engagement agreed upon by sellers and buyers. The engagement objectives express the desired results.
- **Deliverables:** The outputs produced during the process of achieving the desired result; they often produce benefits. Deliverables are usually of three kinds:
 - ➔ **Insight deliverables** are, generally, something you can hold in your hand, such as learning objectives for a training program, the results of a competitive assessment, a forecast, specifications, and validated assumptions
 - ➔ **Planning deliverables** include the wide range of outcomes necessary for producing a conceptual or implementable plan such as arrangements made to conduct a training program, resource requirements, and implementation timetables
 - ➔ **Implementation deliverables** are something you can readily witness or observe, often capable of being measured and evaluated, such as a program for training consultants, trained consultants (or sales forces or...), and improved targeting efforts on the part of a sales force

Strategies/Key Points to Remember

- ✓ By focusing on what deliverables the prospect is asking for, you can help determine the project type:
 - ➔ For example, if the prospect wants a deliverable which answers a critical yes or no question, then the project type could very well be or include insight.
 - ➔ For example, if the prospect asks for a detailed implementation plan, then the project type will be or include planning.
 - ➔ For example, if the prospect wants you to implement a plan, then the project type will be or include implementation.
- ✓ Phrase deliverables to express an end result as opposed to a process. Example: Prefer "a detailed list of expansion alternatives" to "an expansion analysis," since the detailed list of alternatives suggests what the client will receive, as opposed to the process, the analysis, that produced the deliverables.
- ✓ Recognize that even a “planning” project will frequently contain insight deliverables. In developing any kind of plan, that is, one needs substantial insight, which often comes in the form of deliverables.

Prospect's Expected Benefits (Cell 6)

Definitions

- **Benefits:** Those good things that will accrue to the prospect while their desired result is in the process of being achieved (i.e., as deliverables are completed) or after their desired result has been achieved. To generate as many benefits as possible, think of the following six categories (not mutually exclusive) of Benefit Types:
- **Economic benefits:** Enhancements in productivity and increases in revenue that come from recasting the economics of the prospect's organization. Examples: increased market share, lower inventory, reduction in suppliers' prices, improvement in stock price.
- **Relationship benefits:** Improvements in relationships with stakeholders (i.e., customers, suppliers, employees and shareholders). Examples: improvement in investors' relations, minimal stress on the organization due to effective change management, better communication with suppliers.
- **Products/services benefits:** Either marketplace insights or the innovation, conception, design, or delivery of leading-edge products and services. Examples: improved distribution to clients' customers, better understanding of future market potential, sales of a new product.
- **Insight benefits:** Often something you hold in your head—for example, understanding, awareness, or knowledge. For example: the benefit derived from a forecast (a deliverable) that allows one the understanding to determine the likely revenue for a drug and therefore the level of investment justified for launching that product.
- **Planning benefits** (which also can often involve understanding or knowledge) can be:
 - ✓ An enabler for achieving a result — for example, "a road map for...," "an understanding of the magnitude of the effort," "direction...," etc. For example: the benefit of a revised call and targeting plan that allows one to know how many reps need to be deployed and where.
 - ✓ Group buy-in — for example, "commitment," "consensus," or "confirmation." For example: the benefit from training the sales force in the value of a revised targeting program, so they both believe in it and execute it fully, rather than continuing to call on their old familiar doctors.
- **Implementation benefits** (which often involve a change in business performance and therefore a measurable result that should be quantified whenever possible) can be:

- ✓ the ROI achieved from a higher value on a drug for which you do a licensing deal
- ✓ a more productive sales force
- ✓ a greater return on promotional spend through better targeting

Completing the Psychologics Worksheet

Individual Buyer Benefits (Cell 1)

Definitions

- **Buyer:** An individual who will be involved in the consultant-selection decision.
- **Buying role*:** The role or roles an individual will play on *this* selection committee:
 - ✓ **Economic buyer.** Number: usually only one. Role: to give final approval to buy. Has direct access to monies, controls the release of those funds, and has discretionary use of them. Focus: on the bottom line and on the overall impact on the organization. Asks: “What will be the overall performance improvement and return on this investment?”
 - ✓ **User buyer.** Number: one or more. Role: to judge the impact of the project on operational performance. User buyers will use or supervise the use of your service and will have to live with the results of your service. Focus: the adequacy and practicality of the proposed solution and on that solution’s effects on the potentially affected organizational unit. Asks: “How will the project affect my job and those I manage?”
 - ✓ **Technical buyer.** Number: one or more. Role: to screen out bidders. Technical buyers judge the proposal by quantifiable, measurable criteria, act as gatekeepers, and make recommendations. Focus: on your service per se. Asks: “Do the proposed approach and/or qualifications and/or price meet our specifications?”
 - ✓ **Coach.** Number: ideally, one or more. Role: to act as a guide for this proposal opportunity. Coaches provide and interpret information about the situation, other buyers, and how each wins. Focus: on the success of this sale. Asks: “How can we pull this off?”
 - ✓ **Ratifier.** Number: normally one in commercial-sector sales, usually higher up in the organization and outside the official buying committee. Role: to bless the recommendation of the economic buyer. Focus: on potential organizational conflicts (for example, with colleagues, constituencies, other programs, and organizational culture). Asks: “Will this project and these bidders meet my broader ‘political’ and/or personal objectives?”

* The first four buying roles are adapted from Robert B. Miller, et. al., *The New Strategic Selling*. New York: Warner Books (2005).

- **Individual Buyer Benefits:** Including Insight/Planning benefits and Implementation benefits, the good things that accrue to an individual buyer from your achieving the insight, planning, and/or implementation desired result. These buyer benefits are individual benefits, not the collective ones captured on the LOGICS WORKSHEET. They are personal, often professional, such as an opportunity for career advancement.

Strategies/Key Points to Remember

- ✓ Remember that a buyer can play two or more buying roles: economic, user, technical, and coach, but a ratifier can play at most one other role: coach.
- ✓ Remember that there usually exists only one economic buyer per sale.
- ✓ Always distinguish between having a coach and getting coaching. Many buyers can provide coaching (to you *and* your competitors); however, your coach or coaches want only you to win.
- ✓ Remember that a ratifier is not usually a member of the selection committee and might not even be known by buyers other than the economic buyer.
- ✓ Note especially the individual buyer benefits identified for the economic buyer. If these do not exist in the Expected Benefits cell of the LOGICS WORKSHEET, consider if you should enter them there, red-flagging as you go. If you do so, realign, adding deliverables that will produce the benefits, and possibly changing the overriding question and therefore the scope of the project (and possibly justifying the additional fees with the additional benefits).
- ✓ If the proposed engagement does not involve implementation, use a Measurable Results Mindset to indicate measurable benefits a buyer could enjoy after subsequent implementation.

Hot Buttons (Cell 2)

Definitions

- **Hot buttons:** Desires or concerns of an individual buyer that will/could affect how you execute your business-development strategy, construct the methodology, and/or configure the project organization.
- **How addressed:** Hot buttons can be addressed in three ways.
 - ✓ *Selling Process:* by interacting with the prospect during the business-development process.
 - ✓ *Methodology:* by configuring the methodology differently than you would if you were not addressing the hot buttons
 - ✓ *Project Organization:* by modifying the composition and reporting of the project staffing/organization.
- **Hot button benefits:** Good things that accrue to an individual buyer from having her or his hot buttons addressed. These benefits are personal and often private (often related to an individual's hidden agenda), such as the desire for control or recognition.

Strategies/Key Points to Remember

- ✓ Recognize that you don't invent hot buttons; they exist, and addressing them, especially those of a high power base buyer, is essential.
- ✓ Recognize that addressing a buyer's hot buttons is extremely important in developing a strong relationship.
- ✓ Remember that hot buttons usually have emotional rather than technical content.
- ✓ Phrase hot buttons as single words or short phrases.
- ✓ Recognize that engagements have been won because one firm detects a crucial hot button that others do not.
- ✓ Recognize that engagements have been lost because teams listened primarily for technical details, which is necessary, but not also for emotional content, which can make all the difference.

Buyer Receptivity (Cell 3)

Definitions

- **Power base:** An individual buyer's level of influence on *this* buying committee, not to be confused with the buyer's general level of influence within his or her firm.
- **Receptivity:** A measure of a buyer's opinion or feeling about your selling efforts to date.

Strategies/Key Points to Remember

- Rate all buyers' receptivity (from - - to ++) based on their feeling about you and your team for this opportunity at this moment in the business-development process.

Evaluation Process/Criteria (Cell 4)

Definitions

- **Evaluation criteria:** Those criteria the committee will use to select the consultant.
- **Knockout** [or “threshold,” “preemptive,” or “go/no go”] **criterion:** A criterion that, if not met, removes a bidder from the competition. For example: must have a strong presence in Country X.

Strategies/Key Points to Remember

- Recognize that the prospect will benefit by your knowing the evaluation criteria because you will be able to deliver a more tailored proposal.
- If the prospect has not identified the evaluation criteria, provide value by working with the prospect to define the evaluation criteria
- Weight the evaluation criteria quantitatively by percents or qualitatively as high/medium/low.
- Recognize that by knowing the selection process, you will be better able to strategically decide where and when to intervene and, possibly, identify the existence of a ratifier.

Competition (Cell 5)

Definitions

- **In-house:** The prospect's alternative of using internal resources to conduct the engagement.
- **Other initiatives:** Other existing or upcoming internal projects that could compete politically or economically with you proposed engagement.

Strategies/Key Points to Remember

- ✓ Understanding the prospect's benefits from other initiatives can provide you insight on the relative criticality of your proposed engagement.
- ✓ Members of the consultant-selection committee will be evaluating the various bidders based upon the evaluation criteria. Therefore, you must assess your own and competitors' strengths and weaknesses based upon these criteria, not more general ones such as number of offices and locations that might not be relevant to this engagement.
- ✓ Use situation-specific counters rather than boilerplate reasons why you are superior to the competition.

Themes (Cell 6)

Definitions

- **Themes:** The **H**ighlighted **E**ssential **M**essages that **E**xpress the character of the prospect's **S**tory. Themes are the key messages that:
 - ✓ Express the prospect's spoken and unspoken motives critical to the engagement's success
 - ✓ Thereby communicate that you and the prospect "grew up in the same house together"

Strategies/Key Points to Remember

- ✓ In selecting themes, focus on hot buttons of medium or high power base buyers, on evaluation criteria on which you rate especially high, and on counters to your key competition.
- ✓ Although themes come initially from hot buttons, evaluation criteria, and/or counters to the competition, they can be combined and reconfigured as you continue to think about the prospect's "story."
- ✓ Themes that come from hot buttons are often process related, associated with the manner in which you will work with a client, rather than the results you'll achieve.
- ✓ Themes coming from "conflicting" hot buttons (such as "desire for local autonomy" and "desire for centralized control") can sometimes be combined, though re-articulated: "Our approach that balances the competing needs of X and Y."

Cells 7-9

These cells allow the pursuit team to use informally the same process that occurs during a 40-minute Red Team Review. At any point or at many points during the business-development process, the pursuit team can list its strengths and weaknesses (Cell 7), indicate potential actions that might leverage those strengths and address those weaknesses (Cell 8), and assign responsibilities for undertaking those actions (Cell 9).

Completing the Themes Development Worksheet

In developing the themes, “listen” to your thinking as it is revealed on the worksheet. Sometimes, you will discover a new theme or realize that one theme should be divided into two or that two themes need to be combined into one.

In completing the last four columns on this worksheet, use complete sentences. You are developing an argument of propositions and claims. By using complete sentences, you will have to be more rigorous and disciplined in your thinking.

- **In the Situation column**, the focus (and therefore the subject of the sentence) is the prospect: “Because of [something in the current situation, S1], you [the prospect] need [something related to this theme] during or after the conduct of this engagement.”
- **In the Methods column**, the focus is on you: “Therefore, we will [do something related to this theme], either in our proposed methodology, and/or in our proposed project organization.”
- **In the Qualifications column**, the focus remains on you: “Given our approach, we are qualified [in these ways, related to this theme] to conduct it.” Content in this column is often the most difficult to construct because it demands specificity related to the theme rather than generally stated qualifications like “We know your industry.”
- **In the Benefits column**, the focus returns to the prospect: “As a result of our approach and qualifications, you will benefit [in these ways related to this theme].”

N.B.: After completing the THEMES DEVELOPMENT WORKSHEET, compare the information in the Benefits column with the information entered in the Benefits cells of the LOGICS WORKSHEET. If you have identified new benefits, add these to the Benefits cells and align them with deliverables and effects of the overriding problem, using red flags as necessary.

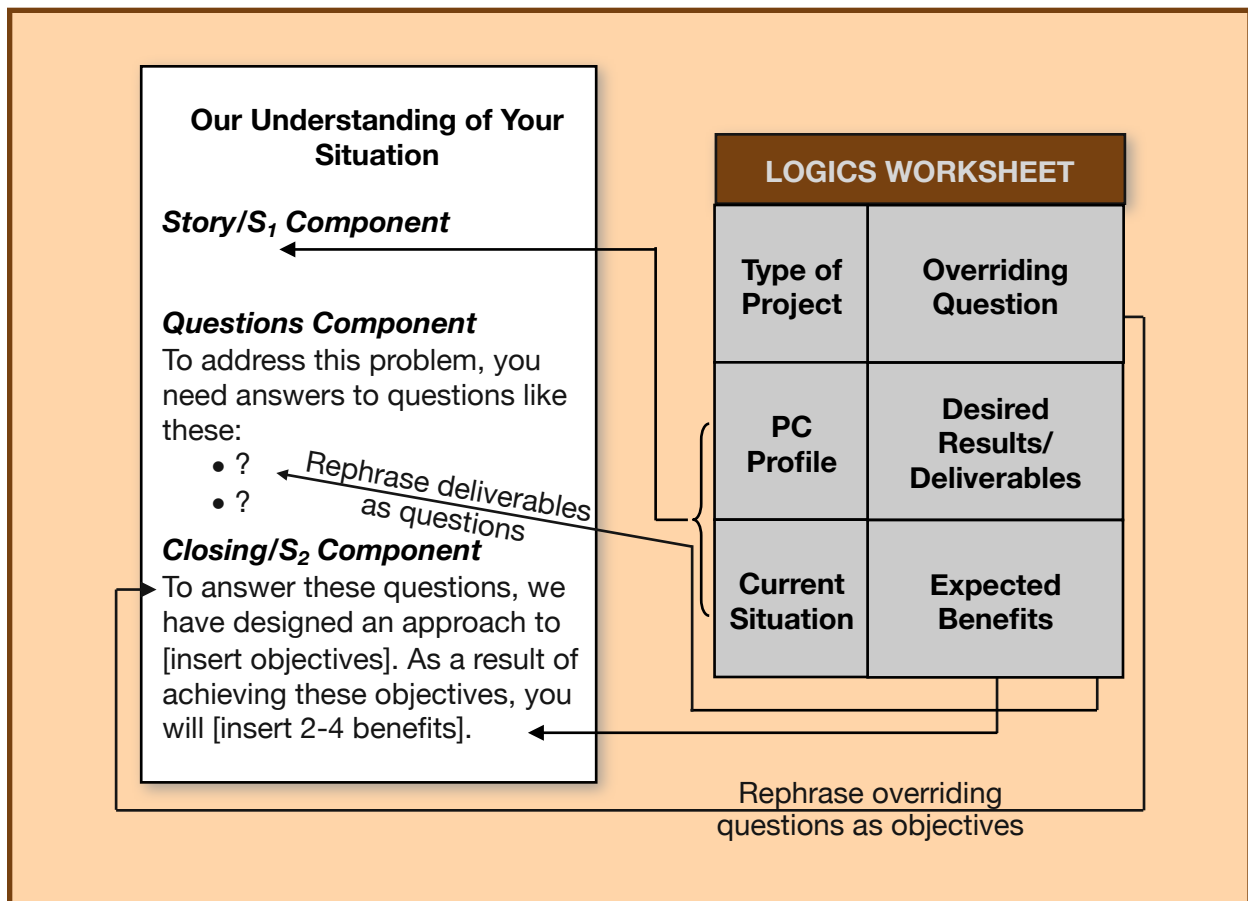
Strategies/Key Points to Remember

- ✓ Be careful about developing themes that come from red flagged hot buttons, evaluation criteria, and counters to the competition. You could be constructing a specious argument based upon bad assumptions.

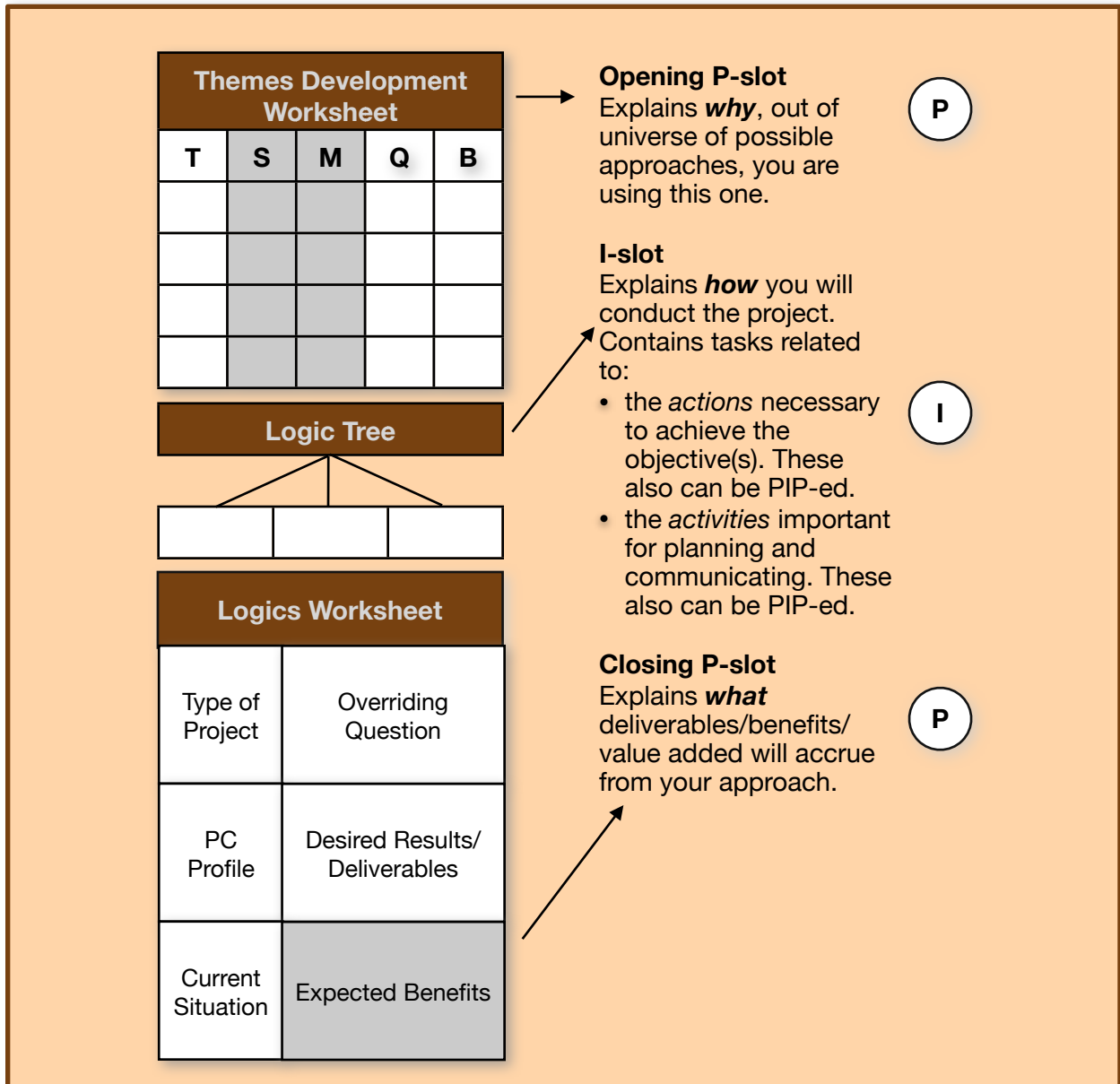
- ✓ If the benefit created in the benefits column already exists on the LOGICS WORKSHEET, you will have tended to confirm that benefit.
- ✓ If you have generated a new benefit in this column, add it to the LOGICS WORKSHEET, red-flagging as you go, and check its alignment:
 - ➔ Is there a deliverable that will produce it, and if not, should one be added?
 - ➔ Does adding a new deliverable change the scope of the engagement by requiring a different desired result and overriding question?
 - ➔ Is the benefit aligned with an S₁ effect or lack of benefits?

Integrating the Worksheets' Content into Your Proposal

To create the "Background" section...



To create the "Methods" section...



To create the major claims for the qualifications section...

Themes Development Worksheet

T	S	M	Q	B

We are the best firm

Why?

We are ...	We have...	We can...
------------	------------	-----------

Why [Your Firm]

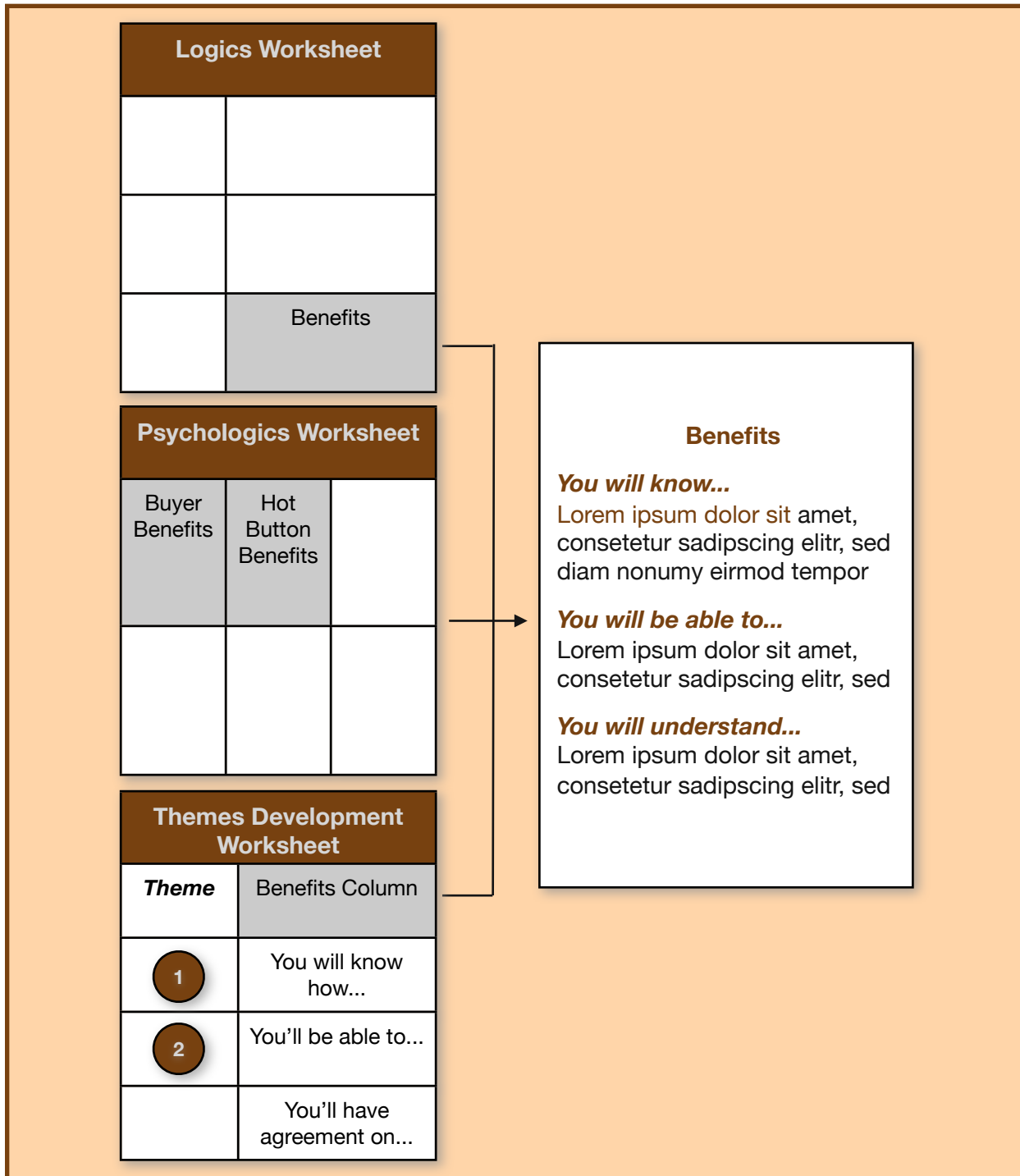
We are especially qualified for this engagement for these reasons:

We Are...
Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor

We have...
Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed

We can...
Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed

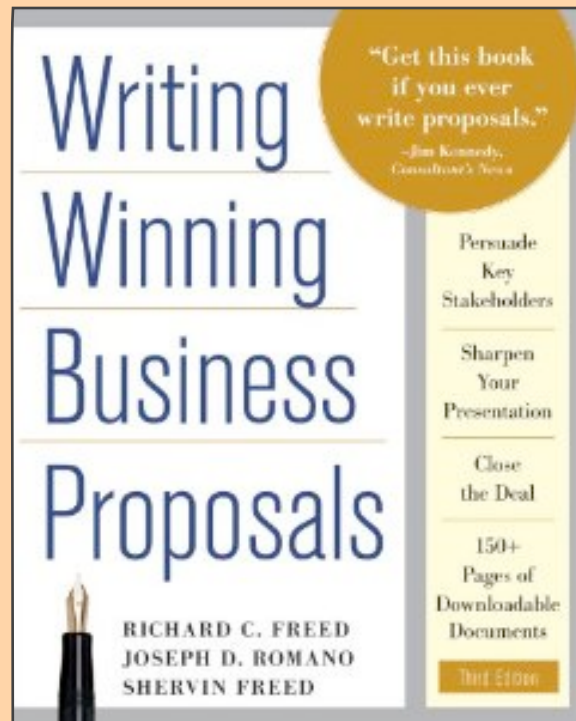
To create the “Expected Benefits” section...



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