education for architecture, engineering, construction, and related consulting firms. Educational programs offered by SMPS, both at a national level and through local chapters, can be found on its Web site. (www.smps.org)

5.2 Seeking the Project

Howard J. Wolff

More than one well-known architect has said that the first job is to get the job. In a world of sophisticated owners and many qualified architecture firms, getting the job can be a challenge.

More than an activity, seeking the project—sales—is a managed process. Typically, the selling process includes the following ten stages:

- Finding leads
- Screening prospects
- Courting prospects
- Making the go/no-go decision
- Expressing interest
- Planning your approach
- Writing the proposal
- Making the presentation
- Closing the sale
- Debriefing

The above stages are not necessarily linear. Courting prospects may have begun months or even years earlier and will likely continue through all of the steps outlined. Some clients do not require the submission of detailed qualifications until proposals for services are requested. When a firm has a long-standing relationship with a client, the activities listed may happen all at once, in a single meeting, or in a phone call confirming the architect's selection.

FINDING LEADS

Sources of leads are all around you. The easiest and cheapest sources of leads—and often the most fruitful—are your current and recent clients. They know you, your firm, and your capabilities. Do not be afraid to ask these questions: "What else do you have coming up that we can help with?" "Who else should I be talking to?" "May I use you as a reference?"

These questions are an opportunity to think beyond a narrow definition of architecture services. As you discover a client's needs, think of yourself as a consultant who can help solve problems. By reframing how you view your business, you expand the ways you can help your client. For instance, architects can offer a range of expanded services, which

Here is a handy short list of lead sources:

Accountants
Alumni associations
Attorneys
Bankers
Commerce Business Daily
Community service clubs
Consultants
Contractors
Employees
Existing clients
Friends
Lead-finding services
Lead-swapping networks
News media
Other architects
Past clients
Realtors
Receptionists
Religious institutions
Secretaries
Services
Trade associations
Trade publications
Vendors

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COLD CALLS MADE EASY

Most architects dread making cold calls. Here are some tips to make the process less painful and more productive—maybe even fun.

- Set aside a block of time each week, day, or whatever—and make the calls with your desk cleared of any other agenda.
- Recognize that you will usually have to make several calls to get to the right person. Plan on three calls.
- Even when you do not find the right person, be pleasant and accommodating. Building relationships applies to everyone in the prospective client's organization.
- Don't keep the person in suspense. Start right out with who you are, the firm you're with, and why you're calling.
- Ask if this is a convenient time to call.
- Design a simple call report and have it in front of you when you call.
- Make a list of "openers" and "probes" to get and keep the conversation going. A sample opener: "We've been reading a lot about your reorganization in the newspapers. Does this mean you are considering facilities changes?"
- Project the image of a professional consultant and problem solver rather than a salesperson. Ask open-ended questions, so the client does most of the talking and you do most of the listening.

The process becomes more valuable and rewarding if you keep your objectives in mind: First, your goal is not to sell, but to help the client buy. Second, a cold call is generally not intended to get your firm a job but rather to give you an opportunity to gather information, build a relationship, and set an appointment for a face-to-face discussion.

might include facilities management, Americans with Disabilities Act assessments, site analyses, training of client staffs, and development consulting. Architects can also help clients make the business connections needed to expedite a project.

The other benefit of directly asking your clients about their needs is that the leads generated are usually yours and yours alone. You do not have dozens of competitors privy to the same information (as you have with leads gleaned from publications, for instance).

Leads can also be generated through market research, public relations, and networking activities. For example, a large, local company is reorganizing: might there be a need for facilities studies? Your greatest success will come from those situations in which you can cultivate leads before others are alerted to the opportunity.

SCREENING PROSPECTS

After uncovering a lead, the next step is to assess its viability. The objective at this stage is simply to screen the leads by answering two questions: "Is this a real project with a real client?" and "Is it right for us?" (For example, "How do the client and the project fit our marketing strategy?")

If the answer to either question is no, move on to something more promising. (To help build your network, you might want to pass the lead along to a non-competing firm.) If the answer to both is yes, you still need to decide whether to proceed. The pursuit of clients rather than projects may mean that you turn down (or be turned down for) a particular job but go on to have a long-term, fruitful relationship with that individual, organization, or institution.

Increasingly, the best way to research prospective clients is via the Internet. Visit their Web site and follow-up on mentions in news stories.

COURTING PROSPECTS

For most clients, the decision to acquire the services of an architect represents a relatively big investment. In addition, it is often perceived as a high-risk or high-visibility decision. The client's decision-making process, therefore, is likely to be studied and thorough. The earlier you start the courtship process, the greater your chances of success. Those who wait to receive a request for proposal before trying to get to know the client are at a distinct disadvantage.

► Public Relations (5.3) describes how to prepare a public relations plan and how to achieve effective media relations.

One factor that can help a client choose among several seemingly well-qualified firms is the level of comfort the client feels with the individual who will lead the project. It is a commonly held belief that friends buy from friends. The objective of the courting process, therefore, is to develop a business friendship with the prospective client. This need not entail attending social events together and becoming personally involved in each other's life. Rather, the emphasis should be on learning about the client's business needs and concerns and then developing a helpful habit of providing assistance in a variety of ways.

Instead of being viewed as a salesperson, you can position yourself as a valued colleague. Here are just a few examples of what you can do to build a relationship with your clients or prospects:

- Send a useful article on a subject of interest to them.
- Point out a beneficial seminar they might attend.
- Feature them in your newsletter.
- Ask them to give a presentation to your firm.

▶ Risk Management Strategies (9.1) suggests that careful screening of prospective clients is a good risk management strategy, too.

As with other business relationships, it is helpful to know who your clients are as human beings—their likes and dislikes, special interests, proudest achievements, and strongly held beliefs. Only then can you develop a strong bond.

An increasingly important tool that can help facilitate the courtship process is a client relationship management (CRM) program. You can purchase these software systems off the shelf or create your own. Generic products that may suit small firms include ACT!, Goldmine, Microsoft CRM, NetSuite, RightNow, Salesforce.com, and Salesnet. Programs specifically designed for the A/E/C industry are offered by BST, Cosential, Deltek, and Wind2. Even if you do not automate your system, recording information about your clients (rather than relying on your memory) allows you to set up a regular schedule of contact, reference past conversations, and strengthen relationships.

▶ See How Clients Select Architects (6.1) for more information on this topic.

Selection committees present a special challenge. Try to find out who is on the committee. Clients may prohibit contact with members of the committee before the interview, but it is still helpful to know whether they have experience with projects like the one at hand and whether certain individuals have special interests or agendas.

As in any relationship, chemistry counts for a lot. If you do not like a particular client, chances are he or she does not feel particularly comfortable with you, either. If you are not a sole proprietor, maybe one of your partners would hit it off better with that client. If you do not have someone to whom you can hand off the contact, then you may need to step out of your comfort zone and adjust your style to match the client's personality.

MAKING THE GO/NO-GO DECISION

Saying yes is easy. Most architects, however, find it difficult to say no, to decline an opportunity to submit a proposal, especially when a lead falls in their lap or they are asked out of the blue to submit a proposal.

As tough as it may be, saying no to certain opportunities is critical to staying focused and growing your firm. Pursuing work that does not meet the criteria defined in your marketing strategy can consume the time, money, and energy needed to obtain projects more suited to your goals.

Repeatedly pursuing projects for which your chances are slim—and continually losing them—can have a devastating effect on morale, not to mention the bottom line. Simply submitting proposals to the same client (this is particularly tempting with government submittals) in the hopes that eventually it will be your turn will not work if you are not the right firm for the job. The right strategy is to clearly define your target and give it your very best shot.

Some firms make go/no-go decisions on the basis of gut instinct; others find it helpful to develop a checklist of criteria with weighted numerical values assigned to each factor. You may want to design such a form for your firm to aid in the process of making decisions, while acknowledging that many of your responses will still be based on instinct.

A final go/no-go question involves the probable costs of pursuing the project and the availability of resources. Substantial outlays may be necessary for principal time, marketing time, meetings, travel expenses, proposal writing, printing, and graphics. Consider your odds (based on your relationship, your unique qualifications, the number of other firms being considered, and the strengths of your competitors), as well as the investment required.

It generally does not make good business sense to have your marketing expenses exceed any potential profit you could make if you were to get the job. A possible exception to this logical rule, however, might be a firm that makes a strategic decision to enter a new market and knowingly considers the cost of pursuing the first client/project to be a necessary and worthwhile investment.

EXPRESSING INTEREST

After you have decided to pursue a particular prospect, it is generally necessary to introduce your firm, if you have not already done so. Send enough information describing your capabilities to ensure that you will be in the running for the job. A personalized cover letter addressing the client's needs and concerns and pointing out the strengths you bring to the project can do wonders to set you apart from the competition. There are also some pitfalls to avoid at this stage:

- Don't send the client extraneous information. Send only what will position you as a firm especially well suited for the particular project you are pursuing. Less is more.
- Don't include every piece of printed material your firm has produced. Remember that you have several stages left in the selling process. Keep an ace or two up your sleeve.
- Don't send an informal expression of interest if the client has requested a formal submission of qualifications or even a proposal for professional services.

Like a good doctor, you need to diagnose before you can prescribe. The focus is on the client at this stage; effective listening skills are critical. Some helpful hints:

- Ask thought-provoking, open-ended questions
- Take notes
- Summarize

PLANNING YOUR APPROACH

After going on record as being interested in a project, you generally have time to plan your approach to getting the job while the client is going through the discovery and qualification process. Gathering information at this stage will not only help you develop a strategy to win the business but also (if done well) position you as an expert consultant able to help clients articulate and define their needs and concerns.

Generally, the best-informed firm has the greatest chance to win, and the best source of that information is usually a face-to-face meeting with the client. A meeting may be more time-consuming and costly than a phone call, but it affords you the opportunity to develop greater rapport and record not only what is said but also how it is said (nonverbal clues).

Architects are trained to ask questions about the project program, budget, and site. Of even greater importance is gathering information about the client's environment, with questions such as these:

- What is the history of this project?
- What are the client's concerns and expectations?
- Who is for or against the project?
- How does the client feel about other architects with whom he or she has worked?
- What time frames have been established?
- How will the project be funded?
- With whom will you be competing?
- What is the decision-making process and who will help the client make decisions?

One word of caution: The answers to these questions may vary depending on who provides the information. In some client organizations, the architect selection process can get quite political. In these cases, you will be best equipped to develop your strategy for getting the job if you ask these questions not only of your primary contact but also of the technical decision maker, the financial decision maker, and the "big boss."

► A backgrounder at the end of this topic provides a detailed discussion of proposal development.

► Architectural Services and Compensation (11.2) discusses project pricing and proposals.

WRITING THE PROPOSAL

The proposal stage of seeking the project presents you with an opportunity to prove how well you listen. An effective proposal states in clear and concise terms your understanding of the client's needs and what you hope is your unique ability to meet those needs.

Many design professionals make the mistake of viewing the proposal as a purely technical document rather than as a sales tool, so the initial focus tends to be on how much time and effort it will consume. If, instead, you think about a proposal as more than just a hoop to jump through, you will see it as a critical step in the business development process. Think about what you want to accomplish with the proposal beyond just closing the sale.

A good proposal supports your selling effort by enhancing the client's perceptions of your capabilities and professionalism while, at the same time, allowing you to clarify the terms and conditions of what you will do. A well-written proposal also benefits the recipients, because it helps them justify why the winning firm was selected.

A fee proposal detailing the scope of your services may either accompany or follow a qualifications-driven submittal.

MESSAGES FOR ACQUIRING PROJECTS

Depending on the circumstances, the client may perceive you—or you may want the client to perceive you—as large or small, local or out-of-town, or expert or novice at the project type. Working within the bounds of honesty, of course, here are some of the messages firms use to relate their capabilities to the circumstances at hand.

Small Firm

- Today's fast-breaking technology demands a generalist overview and one-point responsibility—that's me.
- We are not encumbered by in-house engineers who try to be experts on every project type. We assemble the best team we can from consultants who are truly expert for your unique project. Most of the nationally recognized designers agree with us—they don't have engineers in house.
- Your project is a big one to us. It means a lot and will merit our day-to-day attention at the top. It won't be relegated to lower echelons. In our firm the same architect [me] personally controls [design, specs, other elements of the process].
- Just as in your business, in architecture it all comes down to people. You want to deal with the people who make the professional judgments—not with computers or technicians.
- Your job means so much to us, you can be assured we won't be shifting personnel.
- We are a close-knit office—overview and coordination of all aspects of a project are automatic. Everybody in the office overhears everything—there is no compartmentalization. It's all one-on-one.
- Like you, contractors want to deal with and tend to pay more attention to the head of the firm.
- There is a limit to the number of people who can effectively work on a project. Regardless of firm size, it always comes down to the project team. We are just that—a team—and plenty big enough.

Large Firm

- To be a "master builder" is impossible in today's industry. A team of specialists is required.
- We have in-house capability and therefore have tested relationships and teamwork among well-qualified specialists. We stress coordination. We don't expect you to fund the organizational learning curve of our experts. You'll get a dedicated team to see your project through.
- There is a reason we are the size we are—we have to pay attention to service and responsiveness. You'll get a project manager assigned 100 percent to your project, with oversight by a partner.
- Technology is moving so fast, it takes a firm our size to afford [CAD, quality control systems, continuing education, and so on—if true].
- We have staff depth and plenty of second opinions to ensure the quality of professional judgments.
- We can ride out stop-and-go on a project when necessary.
- We don't depend on outside consultants, so coordination is built in—it's automatic.
- [Construction administration, specs, design, project management, etc.] is a discipline all its own—it deserves an expert such as ours.

Local

- We are here for the long haul. We have a personal stake in the community as well as a professional one. We intend to live with the results just as you do.
- We are here whenever we are needed—we are only [xx] minutes from you, [xx] minutes from the site. We'll know when to be on the job, without you or the contractor having to call us.
- Fees spent locally get re-spent seven times locally. Keep the money in our own town.
- Even if we end up with an out-of-town contractor, most of the actual work will be done by local people. If they cheat you, they will have to work with us for years to come. We keep score—and they know it.

(continued)

Out-of-Town

- We are purely professional—no local bias or pressures to use anything or anybody on your project other than what's best for it. If it meets your needs and wishes, we will fight to get it for you. You wouldn't be talking to us if we weren't specially qualified.
- In an information society, there's no such thing as "remote." Here is how we plan to manage project communication and coordination.
- The fee for architecture services is about one-tenth of 1 percent of the life cost of the project. Pick the best.
- We offer fresh eyes, new ideas, and objective evaluation of the performance of the contractor and all the subs. And we have a basis for comparing their work to the best work in other localities.

Very Little Experience

- The late William W. Caudill, FAIA, said, "An architect who claims to have done ten schools may really have only done one school ten times." We have no preconceptions. We'll be working to answer your needs as you define them.
- We'll be looking for breakthroughs. Your project and site offer unique opportunities. You deserve more than a cookbook solution.
- Let's talk about what's unique about your project and how we would approach the design.
- No assembly line with us. We work hard at staying generalists. Similar but different project types keep us from getting stale. Here are examples of different projects we have done that had similar concerns—and how doing them has given us the diverse experience to qualify us to do well with your project.
- We do lots of different project types—which keeps us enthusiastic and growing professionally. Nothing is by rote or done without our full, professional attention. We *have* to pay attention.

A Lot of Experience

- Everybody likes a winner—which is why we are consistently selected for projects like yours. You have a lot at stake here. We have a demonstrated track record.
- We have no learning curve on this and won't ask you to pay our tuition. Instead of spending time learning the project type, we can focus on your specific needs.
- Let me show you all of the projects like yours that we have done. You'll want to talk to our other clients for this type of project. Here is a list of references.
- Because your project type is one we like and work with a lot, we naturally research it and continually stay abreast of the latest advances in design and technology relevant to it. We've got a head start on anybody else you'll talk to.
- Though we are proud of our design, it's still only 15 to 20 percent of the service we provide. You want experts on the technical aspects—people who've been there and have seen all the variations. We have a lot.

James R. Franklin, FAIA, Current Practices in Small Firm Management

MAKING THE PRESENTATION

Unless they know all the design firms well, clients will usually request a presentation by those that are short-listed. In some situations, this turns out to be the first and only chance in the selling process for the architect and client to meet face-to-face.

Some RFPs are very clear about what the proposal should contain and how the information should be presented. Do not run the risk of being nonresponsive by ignoring these requirements.

Having gone through an extensive screening process to get to this point, most clients consider all the firms being interviewed capable of doing the project. You now have the opportunity to establish rapport and instill confidence. At this stage it is usually chemistry and your knowledge of the project, not past experience, that win the job.

There are many things you can do to carry the day. Careful preparation—including anticipating what is on the client's mind and responding to the client's immediate needs and concerns—is essential. The selection interview is a time to build trust and rapport, not to show off your wares.

▶ See the backgrounder The Project Interview at the end of this topic for pointers for making successful presentations.

CLOSING THE SALE

Although you may come away from the presentation a winner, you do not necessarily have the job—yet. If price has not been an issue up to this point, it now becomes one.

If you have done all you can in the other stages of the selling process to build a strong relationship and to position yourself as the best architect for the job, then negotiating an appropriate fee for your services will be a natural outcome.

While it is helpful to know certain negotiating techniques, the emphasis need not be on learning "tricks" to get the prospect to sign on the dotted line. If the contractual relationship between you and the client is perceived as advantageous to both, you will be off to a good start.

► See Negotiating Agreement (11.3) for principles, techniques, and strategies for arriving at win-win agreements.

So, congratulations. You have the job. Before turning your focus to technical issues and project management concerns, however, it is important to put yourself in your client's shoes. Here is where a little empathy will go a long way. Psychological studies of consumers suggest that the most stressful stage of the buying process can be immediately after a decision has been made. Panic and doubt often set in. Your continued focus on the client's needs and concerns can be reinforced through your actions, confirming that the client made the correct decision in hiring you.

DEBRIEFING

Though the term *closing* suggests that it is the last stage in the process of seeking the project, there is, in fact, a further step of debriefing. Debriefing, or finding out why the winning firm was selected, is critical to ensuring your long-term marketing success. Many firms think of asking why they were not selected, but few do—and even fewer ask why they *were* selected. In both cases, an honest debriefing session with the client can yield valuable information.

If you lose a job, call to thank the client for having considered your firm. No sour grapes. Say that you are interested in the client's business in the long term. Ask whether the client would be willing to share information that could help you do a better job next time. Listen to the client, but refrain from offering explanations or justifications. If you appear defensive, the client will stop offering honest feedback. Remember, too, that you may not always get the complete story.

If you win a job, ask these questions while the process is fresh in the client's mind:

- What does the client like about you?
- What did you do right and what did your competitors do wrong?
- What could you have done better?
- What does the client see as your firm's strengths?
- What differences separated the various firms?

With the information you glean from the debriefing, you are ready to start the process of seeking the next project, and the next one, and the next one.

FOCUSING YOUR EFFORTS

If we assume that, as the AIA firm survey has consistently indicated, at least 80 percent of an architect's work comes from repeat clients, referrals, and reputation, then logically at least 80 percent of your selling effort should go toward building and strengthening long-term relationships with existing contacts.

Most firms, however, spend the majority of their marketing efforts on pursuing new clients—often at the expense of losing the very clients who helped make them successful. The lost business and damaged reputation that come from taking clients for granted can be costly. Conversely, the most cost-effective sales dollars you can spend will be on getting new work from old (or current) clients. Studies suggest that it costs at least six times as much to obtain a new client as it does to maintain an existing one.

► Agreements with Owners (16.1) offers guidance on the continuing process of bringing client expectations into line.

Selling, or business development, is part of marketing—a comprehensive process that includes branding, positioning, and creating awareness through tactics like public relations and promotion. It is all the activities that broadcast what is unique and valuable about a firm and communicate that message from one entity (the firm) to many audiences. Selling takes over when the process shifts to identifying specific prospects or projects, and the communication becomes focused, direct, and one-to-one. This selling process starts with relationship building and continues throughout the project.

For More Information

Most of the resources listed in "Marketing Strategy and Planning" in this chapter address project acquisition.

Organizations that provide useful resources include the Society for Marketing Professional Services (www.smps.org), PSMJ Resources, Inc. (www.psmj.com), and Zweig-White (www.zweigwhite.com).

Publications worth reading include Frank A. Stasiowski's *Architect's Essentials of Winning Proposals* (Wiley, 2003), Nancy J. Usrey's *Insider's Guide to SF330 Preparation* (ZweigWhite, 2004), and Stephen Kliment's *Writing for Design Professionals: A Guide to Writing Successful Proposals, Letters, Brochures, Portfolios, Reports, Presentations, and Job Applications* (W. W. Norton, 1998).

Proposal software tools are offered by CRMFederal (www.fedmarket.com), Cosential (www.cosential.com), and Deltek Systems, Inc. (www.deltek.com).

BACKGROUNDER

PROPOSAL DEVELOPMENT

Howard J. Wolff

Writing proposals is almost never fun. But creating a winning proposal can be immensely satisfying, as it is a critical component of the sales process.

A winning proposal is client centered. It addresses your responsiveness and competence. When you base a proposal on intelligence you have gathered, it provides an opportunity to prove how well you listen by stating in clear, concise terms your understanding of the client's needs and your unique qualifications to meet those needs. Think about how a proposal might actually benefit the recipient, and write in a way that sounds personal, aids the decision-making process, and helps the client justify why the winning firm was selected.

A good proposal supports your selling effort by enhancing the client's perceptions of your capabilities and professionalism while, at the same time, allowing you to clarify the terms and conditions of what you will do and the value of the services you will provide.

The costs of submitting a poor proposal can be substantial (lost job, wasted time and revenue, weak position for subsequent work, damaged reputation), so it is important to take proposal writing seriously. *Any proposal that you deem worthy of submitting should be worthy of the resources to do it right.*

In a small practice, the principal is usually responsible for preparing proposals. In larger firms, the job usually falls to the marketing coordinator, who gets input and assistance from a principal and project manager. In the largest companies, there may be a full-time proposal manager. Whoever it is, the person responsible for crafting the proposal must be a good writer and editor and skilled in managing the process of gathering and synthesizing information—all in an atmosphere that is inherently chaotic.

Proposals: Strategies for Improving Your Odds

- Actively seek opportunities to submit proposals; doing so beats being one of a pack responding to an RFQ or RFP.
- Make the proposal as client-focused as possible. Check your language: Use *you* and *yours* much more often than *I, me, my, we,* or *our.*
- If possible, submit a draft of your proposal for the client to review in advance. Finding out whether the information is on target will save you from spending days or weeks of effort only to be told, "It isn't really what we wanted."
- If you are responding to a formal RFP or RFQ, present your information in the order and format requested. This is not the place for artistic license.
- Hand deliver your proposal whenever possible. This gives you one more chance to make contact with the client and reinforces your interest in the project.
- Make sure your proposal is comprehensive and complete, yet still concise. Don't overwhelm the reader with extraneous information.

Achieving Effective Proposals

The best way to approach proposal production is akin to how you would approach the design of a project. First, make sure you understand the client's issues and objectives. Don't guess. If you don't know, ask. If you are unable to make contact with the client directly, ask others in the client's organization. Second, with a team of relevant contributors, think about the key messages you want to convey and how they illustrate your ability to address perceived needs and deliver superior value. Then define the scope of work, assign responsibilities for writing and production, and determine the amount of time and money to be devoted to the effort. Remember that the proposal represents your firm and its leaders, no matter who puts it together.

When budgeting time for editing, revising, proofreading, printing, binding, and delivering the proposal, be sure to build in contingencies for things beyond your control that can send the best-laid plan off course. For example, consultants on your proposed team may be slow to send their materials. (Tell them up front when you need the information and in what format, and allow more time than the minimum.) Find out in advance how many copies the client requires.

Allow sufficient time for review and revisions. A late proposal is useless. Sending out the final proposal at the last possible moment relies on services—such as overnight shippers, printers, and duplicators—that are not always as punctual as they promise to be. The trick is to plan ahead and build in contingency time for expected and unexpected delays.

The demands of keeping up with current work in an office often mean that time spent on securing future work receives short shrift. The consequence of postponing proposal writing is submitting a piece that relies too heavily on boilerplate and boasting. A rushed job will produce a substandard proposal. Lots of qualified firms have lost work not because of their capabilities or proposed solutions, but because of their sloppy proposal preparation.

A proposal should not only read well but also look good. After all, yours is a design firm. Graphics that are relevant to your content will make the proposal more readable and distinguish your entry from others that are text heavy. Early on, consider those parts of a proposal that require extra lead time, such as a customized cover, special graphics (photos, charts, and other illustrations), and information from consultants who will be part of your team.

It should go without saying that your proposal must meet each and every requirement of the RFP. In addition to showcasing your capabilities, the proposal is also an opportunity for the client to see how well you listen and follow directions.

Keeping the reader in mind at all times, your objective is to make sure the information is concise and substantive. If you were the client, could you unequivocally answer yes to the question, "Does this proposal tell me what I need to know to select this firm?"

All good firms think they are unique. Look at whether your claims of distinctiveness will really hold up against such claims by others, and focus only on what will directly benefit the client considering your firm. The best way to differentiate your firm from your competitors is to take a hard look at their strengths and your weaknesses, and proactively answer any obvious concerns you think the client might be harboring.

Don't oversell. Substantiate any claim you make in a way that readers of your proposal see clearly how your company, your team, and your solutions will benefit their organization.

Finally, more than one person should review the proposal. Sometimes, in the pleasure (relief) of seeing the final proposal printed, assembled, and maybe even bound, you can let it leave your hands without a final look—and that can be fatal. Don't forget to check the cover letter, too.

Types of Proposals

The type of proposal called for will depend on the client and the circumstances. A quick letter may be as inappropriate for a large, institutional selection committee as a thick package may be for an entrepreneurial client who is anxious to cut to the chase and get on with the work. In some situations, you may have a repeat client who simply wants to know, "How much will it cost and when can you start?"

Clients with whom you have a strong relationship and are in a position to understand their needs may be amenable to receiving an unsolicited proposal. In this case, you design and organize the proposal and determine when to submit it.

As Michael McLaughlin, a principal with Deloitte Consulting LLP, points out, "The best proposal is one you don't have to write." There may be times when it is appropriate to ask whether you can start the work with merely a letter of confirmation. It is obviously less costly for you to write a letter confirming your services than to prepare a formal document proposing your services. The confirmation letter skips the competitive proposal process and describes the objective, scope, schedule, fees, and results.

While letter proposals may suffice with repeat clients, larger commissions often entail a two-step process: first, a response to a request for qualifications (RFQ), and second, after narrowing down the field, a response to an RFP. These are generally highly competitive situations in which the clients have determined from whom to solicit interest and what information they consider important to know.

To make it easier to compare apples with apples, many public- and private-sector clients ask that you first fill out a questionnaire detailing your experience and qualifications. Standard Form 330 (previously SF 254 and 255), used by the federal government and some state and local agencies, is an example of this type of qualification document. Competitors are then ranked and short-listed based on materials submitted (and often an interview), and the top-ranked firm is then asked to prepare a fee proposal.

Some RFPs are very clear on what the proposal must contain and how the information must be presented. Don't ignore these requirements. Don't give evaluators a reason for eliminating your proposal because you have not addressed a minor item that was requested.

Whatever sort it is, a proposal, when accepted, becomes a contract. Be sure that your proposal includes not only the information requested by the client but also the terms and conditions that are important to you.

Parts of a Proposal

Every winning proposal addresses the following four essentials:

1. Evidence that you understand the client's needs and desires
2. A specific approach that will address the client's objectives
3. Demonstration of your ability to deliver on time and within budget
4. A compelling reason for the client to choose you and your firm

In support of the four essentials noted above, your proposal may include the following:

- ***Cover letter.*** Here is your first opportunity to sell yourself and your firm—and to tell the client why you should be selected.
- ***Table of contents.*** List the sections in the proposal and include page numbers.
- ***Executive summary.*** The summary, written in client-focused language, confirms your understanding of the situation, provides an overview of what you are proposing, and stresses why your firm is uniquely suited for the job. (This is a very important section; it may be the *only* part of your proposal that certain decision makers will read.)
- ***Scope and situation analysis.*** Here is your opportunity to communicate your knowledge of the client's needs and the scope of the project.
- ***Services.*** Indicate the services included in your proposal. You may want to specifically list excluded services if they have been discussed but are not part of the proposal.
- ***Approach and methodology.*** Explain in detail how you plan to provide your services. Highlight areas in which you can distinguish yourself from the competition. It is important to extract a detailed description of the technical approach from the staff who would be implementing the proposed solution. Remember, clarity and thoroughness should not equate with wordiness. Demonstrate your ability to deliver on time and within budget—not only by referencing relevant projects but also by detailing your proprietary processes. Include evidence of your past successes.
- ***Project team.*** Describe how the team will be organized. Include custom resumes of key personnel who will be assigned to the project. When you are assembling the team members, it is important to be definitive in your staffing and project management plan. If you are ambiguous here, a client has reason to doubt the rationale of your selection and your commitment to making a particular person available.
- ***Recent relevant experience.*** List or illustrate examples of how you have solved similar problems for other clients.
- ***Schedule.*** This is a timetable for accomplishing the work. Because schedules can slip (often through no fault of the architect), it may be wise to indicate time frames in weeks or months rather than specific calendar dates. Also, make sure to build in time for client reviews.
- ***Compensation (fee).*** If required, provide a fee proposal based on a clear delineation of the scope of services to be provided.
- ***References.*** Though not always requested by the client, strong references can greatly enhance your ability to get selected. They can provide testimonial evidence of your ability to meet schedules and budgets. List the contact person's name, title, company, and phone number, as well as a brief description of the services you provided. Be sure your references know you are using their names.
- ***Additional information.*** Certain materials, if considered helpful to the client and supportive of your sales effort, can be included here if not presented elsewhere, such as a list of awards, article reprints, and brochures. Do not include extraneous information. If the materials are not viewed as directly relevant, clients will see this as an attempt to "bulk up" a weak proposal.

In the event that a simple letter proposal will suffice (as may be the case with a repeat client), you generally need include only information about scope, schedule, and fee.

Creating a Proposal

In some firms, the executive summary is written first and serves as a guideline for sticking with salient selling points. The person who knows the prospective client best is the best person to draft a powerful but concise summary. Do not make the client dig for the most relevant information; where possible, put this content—analysis of the client's needs, your approach, and fee proposal—at the beginning of the proposal.

Many firms have some kind of software program from which they can pull relevant corporate experience and resumes. The automated component of proposal development is valuable to the extent that your databases are up-to-date.

To a certain degree, old proposals can serve as templates for new ones. Some boilerplate descriptions may be transferable from one proposal to the next, but it is critically important to customize every response and not rely on merely changing the name of the prospective client. Proposal evaluators can tell when a company has submitted untailored boilerplate.

Having said that, creating a library of boilerplate components can be an efficient starting point. Sections of a proposal that can be drawn from earlier proposals include a description of your firm, its capabilities, philosophy, resumes of key personnel, relevant project descriptions, design process and methodology, and standard terms and conditions.

The information in every proposal needs to be checked for timeliness and accuracy. Resumes, for example, should be updated regularly to reflect new job experience and additional skills. In terms of length, more is not better, and extraneous is worse. Do not get too attached to your prose and be ruthless about cutting material that does not address the RFP requirements. Always keep the reader in mind.

In proposal writing, as in designing buildings, the best solutions come from understanding a client's needs and concerns (in terms of risks, costs, and aspirations). The proposal is about you only to the extent that it is about how you can solve a client's problems and satisfy his or her goals and objectives. You must defend your right to be selected. A proposal is a plan that states what your firm will and will not do, what the costs will be for your services, and how you will deliver a project. Like all other aspects of marketing and selling, the proposal should be carefully tailored to the client and the project.

Some firms use incentive systems to compensate their proposal writers when a contract is won. This may not be appropriate for every organization, but in every case, the individuals who worked on a proposal deserve to find out what happened to it and to learn from both the process and the outcome.

Savvy design firms that have lost jobs are smart to ask the people on the receiving end of a proposal what worked and what didn't. Knowing what impressed them about the winning proposal can be invaluable in the constant and continuing quest to improve your success rate.

BACKGROUNDER

THE PROJECT INTERVIEW

Howard J. Wolff

The selection interview is a major opportunity. If it comes at the end of a long period of relationship building, it is your firm's final chance to instill confidence and establish rapport. If there has been no courtship, the interview may represent your *only* opportunity to acquire the project.

Tips for Making a Good Impression

During the presentation, clients are looking for clues to help them gauge what they might experience if they select you for their project: By all means, don't provide them with an easy reason to eliminate you.

- If you run over your allotted time, clients may infer that you'll have trouble sticking to a schedule.
- If your presentation is not well orchestrated, it may be taken to mean that you'll have trouble managing the design team.
- If your projector bulb blows and you don't have a spare, clients may suspect that you are unable to plan ahead.
- If you engage the clients in the presentation, it will suggest that, once selected, you will continue to involve them in the design and decision-making process.
- If you demonstrate your listening and communication skills by clearly and accurately summarizing the clients' needs and concerns, it will instill confidence in your abilities as a professional.
- If you are comfortable enough with the content and delivery of your presentation to let your personality shine through, the odds are dramatically increased that the clients will feel, "That's somebody I'd like to work with."

- If you imagine that the interview is the first project team meeting, you can demonstrate (through actions, not just words) how you will work together to accomplish the project.

Tips for Planning Your Presentation

The secret to a successful presentation is planning and preparation. Some suggestions follow.

Gather information on the client and the project. Information obtained earlier in the business development process can be verified and updated at this stage.

Know your audience. Learn about the members of the selection committee. Who will be in attendance? What are their backgrounds, roles, interests, biases, and concerns?

Obtain specifics about logistics. It's helpful to confirm the following in advance:

- Date, time, location, and duration of the presentation
- Client preferences regarding the agenda
- The physical characteristics of the presentation space: size and shape; seating configuration; location of electrical outlets, windows, and drapes; availability of props (projectors, computers, easels, flip charts, etc.)

Uncover details about the selection process. Looking for answers to the questions just below can help you *revise* and refine your message. Admittedly, however, these answers are not always readily obtainable.

- How many other firms are being interviewed? Who are they?
- Where are you in the sequence of presentation (first, last, or middle)?
- What criteria will the client use to make the selection? (Is there a checklist or matrix, for instance?)
- How soon after the presentations will a decision be made? Will there be an opportunity to follow up with any additional information?

Some clients are not as forthcoming as others, which underscores the benefit of developing a relationship with the client well in advance of being asked to deliver a formal presentation. The architecture team with the most information is in the best position to design and deliver a winning presentation. Simply having the information is not enough; the planning and preparation work continues.

Strategize your presentation. Based on the knowledge you now have, it's time to hone your message and determine who the players will be. You will need to demonstrate an understanding of how the client's problem is unique and how your approach to solving it is appropriate. Decide who will take part in the interview, remembering that most clients want to meet the "doers" with whom they will be working. Be sure that everyone at the interview has a role to play. Develop a script and choreograph the action.

Prepare your visuals. Digital images, boards, flip charts, videos, and other material can be prepared in advance. If you're good with a marker, you may want to sketch as you talk, using your visuals to enhance your presentation. Darkening a room while you narrate a PowerPoint presentation—and losing eye contact with your audience for a prolonged period—can detract from your ability to establish rapport. If you are relying on technologies (projectors, computers, etc.) to present your case, be sure that everything is hooked up and working beforehand—and carry replacement parts. In preparing for the worst, think about a "Plan B" if your equipment fails, and be ready to present without the use of technology.

Rehearse, rehearse, rehearse. Yes, there is such a thing as over-rehearsing and having your presentation appear canned. For most architects, though, this is a remote possibility. Under the guise of wanting to appear fresh and spontaneous, many presenters risk being unprepared and disorganized. Rehearsing the choreography of the presentation is as important as rehearsing the content. Don't leave these things to chance:

- Who will speak when and from where
- How introductions and handoffs will be handled
- Who will turn lights and projectors on and off, close the blinds, and display the boards
- How and by whom questions will be handled

Time each part of the presentation to ensure that you can say everything that needs to be said and still leave an appropriate amount of time for interaction with the client. Videotaping can help you practice this. Consider using a devil's advocate. Invite a colleague to play the role of the owner, asking questions that are likely to come up and pressing until your answers are clear and crisp.

You may want to use video as a tool in reviewing your practice sessions. Training consultants Tim Allen and Peter Loeb suggest these guidelines to reduce people's fear of seeing themselves on video:

- Give the presenters a chance to say what they think after viewing themselves, before offering your comments.
- Correcting something you see and don't like is more valuable and powerful than listening to others tell you what to do.
- Videotape the whole presentation to see how well it flows and whether it can be condensed or sharpened.

- Concentrate on only small portions—three minutes maximum—of a person's presentation. No one can absorb more than that at one time. Improve that one part and then apply the lessons to the rest of the presentation.
- Have the presenter do the same three minutes again, making the changes he or she wants to make. End on a positive note.

The best interview is a dialogue, not a monologue. In summary, the content and delivery of your message—and your ability to develop rapport with the clients while demonstrating an understanding of their needs and concerns—is much more important than being a wonderfully articulate, silver-tongued presenter. Clients generally don't expect their architects to have the skills of a polished public speaker, but if you are interested in increasing your comfort level in this area, programs such as Toastmasters (offered in nearly every community) can work wonders.

Presentation Tricks of the Trade

Here are some stories from the battlefield that demonstrate how some firms delivered winning presentations by standing out from the crowd:

- After learning that it was the eighth firm to present to the client on the same day, a design team showed empathy for the selection committee by bringing soda and popcorn to the interview.
- Having talked to the manufacturer of equipment that a hospital client was about to specify, an architect (with no previous health care design experience) discovered that the equipment wouldn't fit in the elevator and discussed alternatives at the presentation, showing an understanding of the problem greater than that of the client or the competition.
- When asked by the client if he would provide concepts at no charge, an architect stood up on the table and did a tap dance. "That's what I can offer for free," he said. "Everything else I need to get paid for."

5.3 Public Relations

Kirsten A. Sibilia, Assoc. AIA, LEED AP

Successful public relations raises a firm's profile and reinforces its brand and market positioning, whether the firm is large or small, newly established or in a state of advanced growth and maturity.

Public relations involves activities aimed at communicating a variety of messages to promote an architecture firm and introduce its brand to prospective and existing clients, as well as to potential employees. Much more than just media relations, an effective PR campaign must be multifaceted and grow and change as the firm evolves. This topic covers the essential components of public relations, focusing on the public relations plan, media relations, and recommended industry resources.

THE PUBLIC RELATIONS PLAN

Each firm should have a PR plan. It does not have to be a long and complicated document, but it does have to be referred to on a regular basis and periodically updated to

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