



AIA Best Practices: How to conduct a successful loss debrief

Contributed by Rich Friedman

Summary

Conducting a successful loss debrief can be difficult, but can also be a great opportunity to evaluate your business development process. These tips can help you conduct a successful, informative loss debrief that furthers your relationship with the prospective client.

Why debrief after a loss?

In the business development realm, it can literally be the \$1 million question: "Why did we lose this project?"

- "We've been scoping the opportunity well in advance of the RFP, and we thought we were well positioned."
- "We knew the competition and thought we'd answered the questions, 'Why us? What value do we confer?'"
- "We thought our presentation was solid."

We'd like to think that firms attempt to conduct loss debriefs at every opportunity. However, this is not the case. People don't make time for a variety of reasons, and often, folks aren't held accountable. And often, when they do, the responses can be some variation of "It was a tough decision. There were many qualified firms, including yours. You came in a close second."

Some firms routinely spend thousands of dollars in easily quantifiable costs (e.g., actual expenses incurred) and softer costs (the opportunity costs of tying up principals, PMs and others on the interview team; proposal and graphics folks in your marketing group) on key pursuits. In addition to improving the payback on your investments, there are several reasons to conduct a loss debrief.

- **Conducting a debrief sends a strong message to the prospect that you care.** It communicates that you don't take them for granted, and most importantly, you want to win the next one.
- **If done correctly, debrief data can inform—and improve—several aspects of your marketing and BD processes.** Aspects such as: gathering competitive intel; opportunity pre-positioning; proposals/RFQ responses; your presentation, including the team, preparation, messaging, use of technology, ability to establish a rapport with the client and passion of delivery.

What questions should you ask?

Remember: If you don't ask, you won't get! At worst, the client contact chooses not to answer your question. Be sure to ask open-ended questions that will get you the information you're looking for.

- What were your most important criteria during the selection process?
- How could our RFP response been improved? (Was it clear? Did it sufficiently address your questions and hot-button issues?)
- (If your firm was shortlisted) Why were we selected to the short-list of firms to be interviewed? What stood out about our firm that you liked? What concerns did you have, if any?
- How did we perform during the interview process? (Ask the interviewee to be as specific as possible regarding presenters and their content/style.)
- Which firm did you select and why? How did the selected firm differentiate themselves from our firm and others you considered? What other factors played into your decision?
- How did our fee compare to our competitors?
- What advice do you have as we pursue future project opportunities with you?

Be sure to prioritize these questions in light of interviewee time constraints.

What are the most common mistakes?

There are four main mistakes that many firms make when conducting loss debriefs.

- **Too much time elapsed before the debrief.** Details on both sides begin to get fuzzy. In one case, a client asked me to conduct a third-party debrief eight months after the presentation. My interviewee had to revisit his notes, which wasted valuable time and inconvenienced the interviewee.
- **The wrong person conducted the debrief.** If the person isn't curious enough, takes negative feedback personally or is too technical or project-focused to see the forest through the trees, you won't get useful results.
- **Questions were too general.** Open-ended questions or follow up, probing questions were not asked.
- **Action was not taken on feedback in a timely manner.** Or no action was taken at all.

When should you consider getting outside assistance?

Given the challenges of conducting loss debriefs, some firms choose to outsource this critical task to an independent third party, especially when dealing with strategically important clients, prospects and project opportunities. You should consider getting outside assistance when:

- an investment is warranted given the amount of money spent on key pursuits and potential value of applying the data to future pursuits with that client and to overall marketing and BD strategy
- you believe your clients will feel more comfortable providing constructive criticism to an independent third party who specializes in conducting research and is more apt to respond with difficult, probing follow-up questions
- the consultant has greater success in landing the interview

How might your clients feel if you enlisted the help of a consultant? The following are reactions from some interviewees:

“It’s easier to be more honest when an independent party asks these questions, especially given how closely connected our industry is. It can be difficult and awkward to give someone you know critical or frank feedback.” —A former A/E consultant who joined an owner organization

“I want every firm to succeed because we may want to work with them in the future. I want to be very candid with firms.” —A project decision-maker at an Ivy League institution

When done correctly, loss debriefs can provide actionable information to both improve the performance of your company, and to further your relationship with a prospective client.

About the contributor

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