



The Shortlisting Presentation

Getting the bid out of the door and to your prospect on time always brings a mighty sense of relief, but the workload doesn't end there, of course.

High value proposals and tenders necessitate attendance at one or more shortlisting presentation meetings. The rewards of success can be great, but you have to be well prepared to win. Very well prepared. This is where we come in

Your bid team had to burn the midnight oil to get your proposal in.

The good news is you've now been shortlisted. Great!

The bad news is you must get ready to "go again".

You've got to re-motivate the people who were involved in putting the bid together in the first place – not always easy.

Additionally, some of the people that you want to involve in the shortlisting presentation may have had only limited – and potentially zero – involvement in the development of the proposal itself.

So not everyone is up to speed with the proposed solution and the best approach to take as you move into "the end zone".

But can you afford to risk the chance that all of the time, effort and investment that you have put in so far could go to waste at the final hurdle?

The Winning Proposal supports you in your endeavours to get past the last obstacle.

We'll help you avoid the most common errors at the shortlisting meeting. And then get you to the point where your top team really shines.





They took my outline ideas for the presentation and created a version that was visually very impressive and thoroughly engaging for the audience. A job well done!

EMEA Project Director, Canon Europe



The Tendency to Parachute In

The shortlisting team must quickly be brought to the point where every member is “on the same page”; and that “page” must be different from your competitors’, compelling for procurement and visually attractive.

The greatest error that companies make in getting ready for their shortlisting meeting is delegating the preparation and keeping those who will be up there on the stage on the big day at arm’s length.

Invariably this is well-intentioned - a valiant effort to keep directors and senior managers away from speculative bidding activities and focussed on their day jobs (where incoming revenue streams are already secure and guaranteed).

Whilst these intentions are quite understandable, they result in the top team being parachuted in at the last minute, perhaps only coming together just the day before the shortlisting meeting with your prospect’s reviewers.

Collaborative Development

Working with your nominated shortlisting

team we will facilitate at least one advance session where the shortlisting team - and those in support of the team - come together.

Your bid may have been submitted weeks or even months ago. You might be a bit rusty on your win themes, or perhaps win themes weren’t clearly articulated in the bid in the first place.

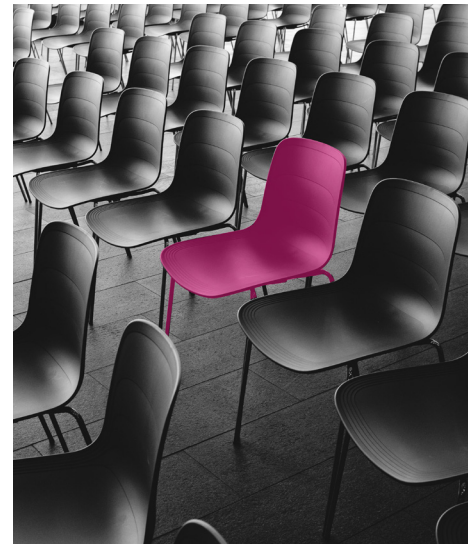
It’s quite likely that one or two people on your top team weren’t involved in bid development at all, so they need to be fast-tracked and fully integrated.

By coming together to agree the team’s preferred approach for the shortlisting session in advance, we start to get your presenters and speakers “in the zone” early.

In so doing, fresh and new ideas are brought to the team for consideration. Individuals and the shortlisting team take far greater ownership than is possible under the standard “parachuting in” scenario.

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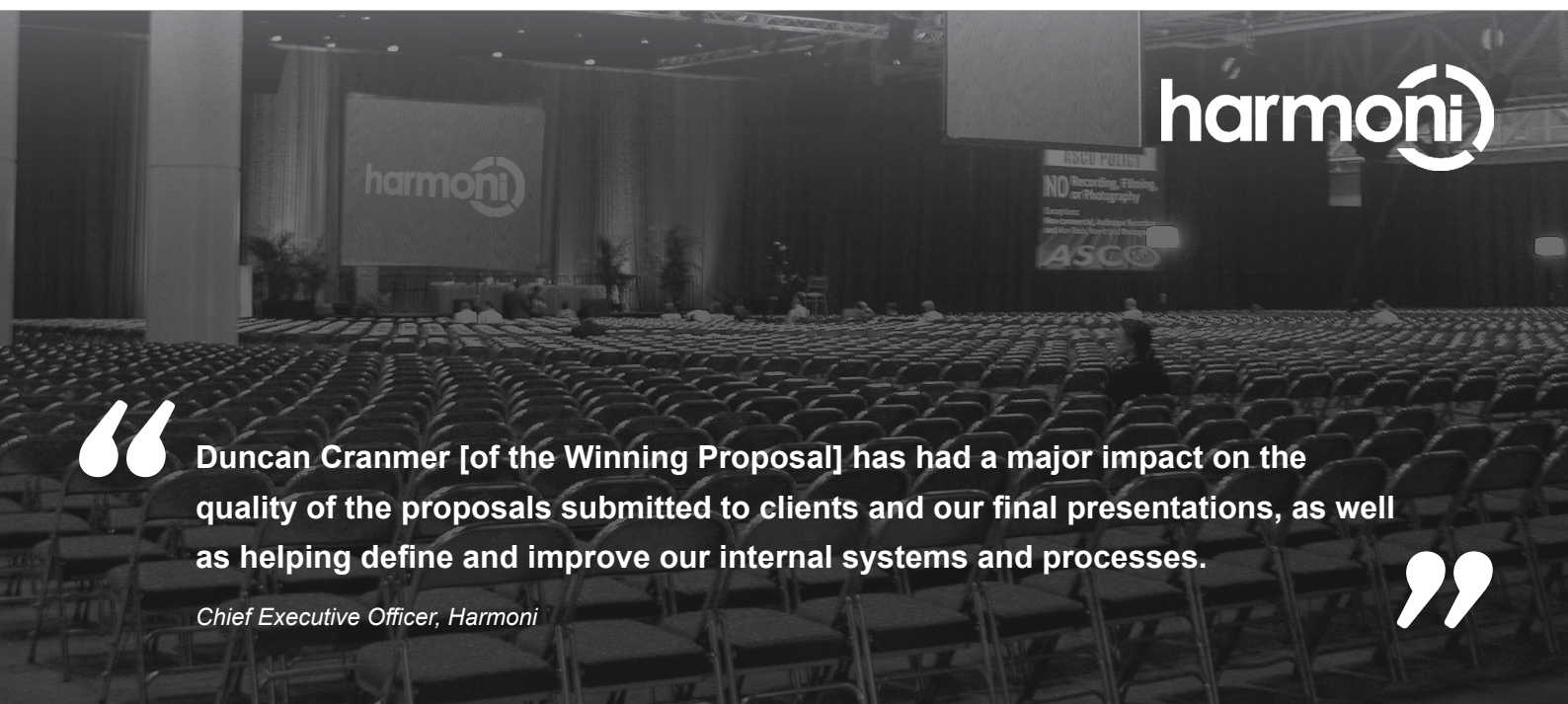
More often than not your topics for the shortlisting event will have been



prescribed by the procurement team, especially in very high value tender opportunities and public sector procurements.

You have got to “answer the question”, of course, but you should feel confident in answering these questions with your own individual and corporate personality, whilst reinforcing those aspects that make you special, the factors that differentiate your proposed solution from your competitors’.

Even if you have not been asked to formally present we will work with you to make sure that win themes and



Duncan Cranmer [of the Winning Proposal] has had a major impact on the quality of the proposals submitted to clients and our final presentations, as well as helping define and improve our internal systems and processes.

Chief Executive Officer, Harmoni



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information is communicated appropriately on the big day.

Nine times out of 10, however, a formal presentation will be requested.

And so we help you by developing a powerful presentation for your forthcoming shortlisting meeting (usually in Microsoft PowerPoint).

The Winning Proposal strongly recommends a visual, graphics-led presentation approach (avoiding an excess of text and a snow storm of bullet points).

The Power of Rehearsal

But again, a wonderful shortlisting presentation alone will not guarantee success. Necessary, yes. Sufficient, no.

Indeed, a visual presentation can actually make things harder for your presenters.

By reducing the amount of text in your shortlisting presentation and paring down complex process flows and charts to their essentials, your presenter has suddenly lost some of their familiar "crutches".

The visual presentation method means that your presenters are obliged to connect more directly with their audience, spending less time reading from their slides with their backs turned towards procurement.

Connecting with the audience is good – very good indeed – but your presenters are going to have to invest time rehearsing their materials, especially if this audience-centric approach is unfamiliar to them.



Is that it?

Not quite ... there's still a little more.

Even the most experienced directors and knowledgeable operations personnel, for instance, can trip up during the Q&A (Questions and Answers) session that follows the shortlisting presentation.

The most common issues we see here are:

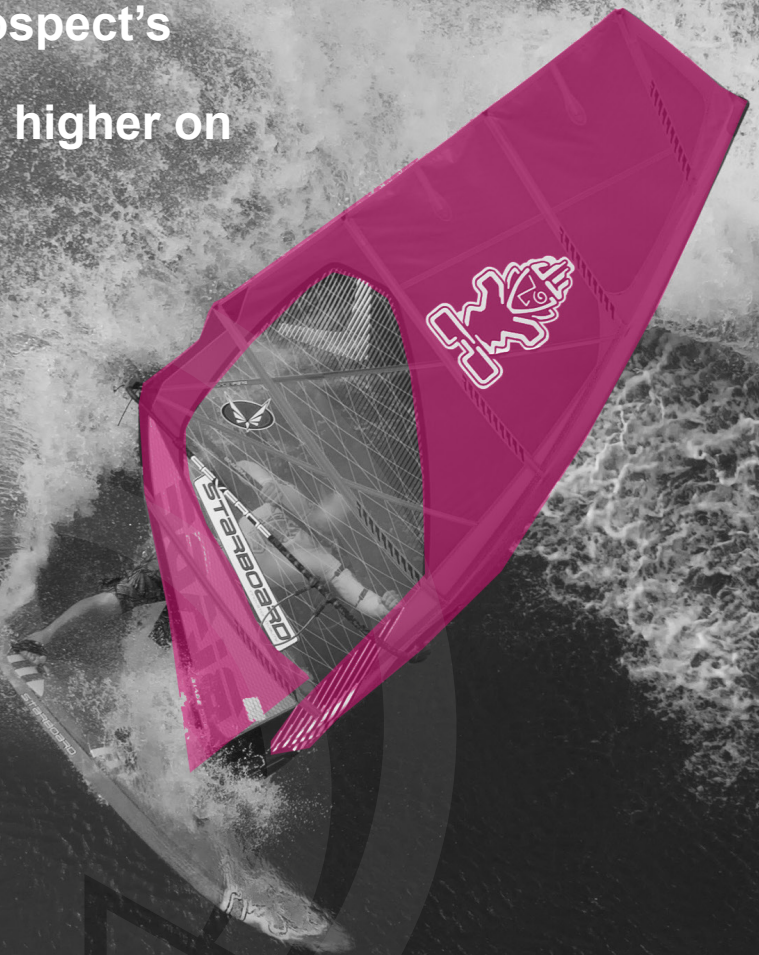
- The team not being clear on who amongst their number **should be answering the question**
- **Uncomfortable silences** followed by two or three people suddenly piping up at the same time to answer the question and fill the embarrassing void of silence
- One team member **jumping in before a colleague has finished speaking**, so that the shortlisting team trips itself up





- Everyone on the team **assuming that they have to chip in on every answer**
- **Your answers are too long**, taking up too much of the precious time that has been allocated to you
- The Q&A session having to be wrapped up without all of procurement's questions being asked as a result of **verbose answers from your team**

If your shortlisting team is exhibiting some or all of these symptoms then you have a problem ... your team doesn't appear unified: so can your scorers truly be confident that your company is joined up and that the proposed solution will work in the way described in your documentation?

So we get your team to the point where these things don't happen (yet without the team appearing "fake", "unnatural" or "rehearsed").

By the time your much-anticipated –
but also dreaded - shortlisting meeting
comes around you can rest assured that
everyone on your team is going to shine
and really impress your prospect's
selection panel. By scoring higher on
the day you win more bids.



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