Strategic Research for Proposals and Presentations

By Frances C. Gretes

The November 2006 issue of A/E Rainmaker featured the second article on research tactics for new business by Frances Gretes. The focus was on research for publicity activities.

The third level of research is where you need high-precision strategic tools. This is where the important Go/No-Go decision is made and when research is being conducted in preparation for the proposal and presentation phase.

There are several things at play here: major players, the client's environment, the competition, funding and consultants. Designing for a client involves understanding the mechanics of politics. This is why you need to spend time researching the people involved with the project; the decision makers, the stakeholders, the political influencers, collecting biographical information. This can easily be found on the web. Then, it's "who knows who," and what their interests are. Those searches can be done in Factiva, community board meetings, letters to the editors, public profiles, and board memberships from directories.

Before important presentations, prepare biographical summaries of the selection committee members, with photos if possible, so you know who to direct your attention to in a conference room. The level of detail depends on the importance and complexity of the project.

In pursuing a university master plan for example, typical sketches of campus histories and early master plans are valuable, and if you're pursuing a lab, you'll want to get very educated in that scientific discipline, like stem cells, master physics, or nanotechnology. You don't need to become an expert, but you do need to put it all in layman's terms so you all can speak intelligently about that subject. The art and science here is summarizing what usually amounts to a lot of information down to the causes essential to the project.

You must also research the competition, who has worked with the client before, is the project funded, will it be profitable? For funding capacity you can just ask. If it's public it's going to be available. As for political, you can find out who knows who, or who has worked at that institution. If you know who worked for that client on projects surrounding the one you're going after, you can find out who all the consultants were and if they had any problems, and who were favored. This can tell you which ones to avoid putting on your team and who to seek out. You can do some of this on the news retrieval searches, to see if there were any community issues, prior protests or the like. This information will be available primarily through phone calls and some online searching.

As for researching consultants, calling your colleagues at other firms is the easiest and will yield the best information. Clients like it when you use the same consultants, as that shows that you have a strong relationship. For new consultants, they need to have a specialty in a niche market that you know about it ahead of time. Keep a database of all consultants, especially the ones that have a unique specialty.

For niche consultants, check periodical indexes for similar projects that have won awards, then find out which consultants were used on those projects. If the same name keeps showing up, they are good choices. Take it one step further and confirm, through a phone call, whether that consultant has a good relationship with the client.

After you have learned of the results of your submission or presentation, follow-up research is essential. After the presentation, analyze it and pull out what you can use again, and determine what you can do differently. Always ask for a debriefing whether you want it or not. You need to know what worked and why, and what didn't work, and how you can improve. This tells you how your firm was perceived.

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