Creating an 'experience' within formal interview presentations

Relationship-building is one thing; closing the deal is another.

By Anne Scarlett, printed in PSMJ's *AE Rainmaker* and *RainToday*

Throughout the lead development process, business development professionals work very hard. We make contacts, nurture relationships, submit RFPs, all before we finally get our chance to interview with prospects.

By the time we get to that interview, we realize that all of the firms are fully qualified—especially in terms of project portfolios and proven performance track records. So what's in question? Quite simply: the personalities and the 'wow' factor. When considering how to showcase synergies and group dynamics, what's better than giving your prospects an opportunity to truly 'experience' working with you and your team?

Creating an interview 'experience' is possible, even within the limited timeframe of a formal client interview. Think about it. As a service provider, your firm often facilitates sessions around project strategy; programming; and design charrettes. Why not dedicate a portion— or even all— of the interview to facilitate a dialogue? In other words, why not make your presentation truly interactive, rather than just saying it will be so?

HERE'S HOW IT'S DONE. (I'VE USED THIS FORMAT MYSELF, SO I KNOW IT WORKS):

* **Prepare and submit an agenda in advance.** Share your intentions to incorporate facilitation as part— or even all— of the presentation.

* **If the client requests specific points to be covered by each team, then include those points within your own agenda.** Just allocate plenty of time for facilitation as well.

* **In advance, prepare your firm's top three messages that you want to emphasize to the client.** Think: "If the client remembers nothing else from this interview, I hope they will remember this…"

* **As well in advance, work out some potential talking points that you may want to cover during the facilitation, depending upon the direction it takes.** Practice drafting out (in a simple format) your team's process, and/or diagrams to illustrate a point. You can always bring mini-sketches of these diagrams to reference if you need to draw them in real-time.

* **During your rehearsal, have someone serve in the prospects' role while your team guides them through the interview.** Pre-select the facilitators and the scribes. Make it smooth and organized, yet be flexible and open to spontaneous shifts during the actual interview.

* **Make sure you have flip charts with a sticky back, along with multi-colored markers.** Bring at least one easel.

MAYBE YOUR AGENDA IS STRUCTURED LIKE THIS:

I. Brief introduction of firm, team, and client. (Oral; casual and quick).

II. Brief summarization of your understanding of their project goals. (List these in real-time. Ask if there are any additions or changes.)

III. Identification of top three-to-five client challenges/issues for project. (This part is facilitated by you. It will require your ability to help guide the client through their priorities and get them talking immediately. In addition to stating the top three-five, it may require grouping items into buckets, and/or creating a parking lot. Document on flip charts).

IV. Reflection by your team of how you would propose to tackle the identified challenges. Use relevant, real stories to support your proposed approach. Whenever it makes sense, tie their challenges back into the key messages that you mentioned during the introduction. Perhaps it will also include a representation of your process, by drawing it out in a simple form.

V. Presentation of initial design schemes, if required.

VI. Wrap up: Inquire if there are additional questions. And finally, repeat the top three messages that your firm wants to leave them with (the ones you started with at the beginning).

REASONS TO USE THIS FORMAT:

* Your team shows off its ability to glean information from a client group, and then initially organize that information into something solid, real.

* Teammates demonstrate how they work with one another. Team dynamics can be quite telling.

* Your team exemplifies tremendous listening skills, making the prospect feel both heard and respected.

* Your prospect speaks out, so the overall experience will be fun and interesting. And don't worry; during the dialogue, those that have a less important 'voice' will most certainly defer to those that are the decision-makers.

* Time flies! The overall experience is kinesthetic and engaging. It will be memorable, unique, and will greatly differentiate your firm!

DON'T DO THIS IF:

* Your team is risk-averse, and doesn't like the idea of simply using talking points rather than a prepared presentation.

* Your team is unable to think on its feet, especially if the client throws a surprise curve ball.

* Your prospect is not willing to be led through an active dialogue. They simply want to 'be pitched'. (This needs to be determined ASAP, which is why you need to share your agenda/intentions in advance).

* Your prospect includes decision-makers that will not be involved in the actual project. (Thus, they don't care about the 'experience' of working with your team).

If you have a team that is ready to show off their talents as professional design consultants— quite literally— then this is a great interview format to consider!