

Secrets of successful presentations and proposals

by Linda Julian

In times gone by, practitioners waited for clients to call or visit. Clients presented legal problems, lawyers solved them, then sent a bill based on scale or time. Bill paid, everyone was happy. But the world changed.

Nowadays, business is slow for lawyers who sit and wait for the telephone to ring. Like other professional service providers, lawyers have to compete for work - sometimes even from long-established clients.

Clients are increasingly demanding, their "loyalty" is diminishing, and making presentations and delivering proposals to keep business and win new clients are now routine business development activities.

By following these guidelines, you can substantially improve your chances of success. Broadly, the same rules apply to both proposals and presentations.

Merely being invited to pitch for work is insufficient reason to spend scarce business development resources pursuing every opportunity. Firstly, choose whether to propose, or not.

Assess against these criteria:

- Do you have people and skills to handle the work ?
- Does it fit your strategic direction, or is it a distraction ?
- What is the fee potential of the opportunity ?
- Can you differentiate your services from likely competitors ?
- Is your approach innovative ?
- Will your services be cost-effective for this client ?
- What is the probability of winning ?

After cool evaluation, if you decide to pursue the opportunity, treat your presentation or proposal as the only chance to make the right impression, and a minor honour.

No matter how tempting, it's not good enough to just dish up standard material, nor to re-hash the last version. Your proposal or presentation must be carefully tailored to your audience.

Don't tell them what you want them to know. Instead, **think of it from their viewpoint**. Put yourself in the recipients' shoes:

- Who will be reading or listening to this ?
- What do they need ?
- What will interest them ?
- What is their agenda ?

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Especially in personal presentations, **set a realistic, achievable target**. Maybe, it's a panel appointment, or acquiring one sizeable matter. Winning all the legal work from a major financial institution, for example, is unlikely to be a realistic target, even if you have the capacity to deliver the service.

Next, assemble the information you'll need for your presentation or proposal. Make sure it's relevant. Do sufficient research to be credible. Cull pertinent items from "standard" material.

Structure your proposal or presentation to fit the material you've selected. Proposals should include table of contents, section headings, and subheadings. Make sure any pricing information is in digestible form.

Plain English is mandatory. And, it ought to go without saying: grammatical and typographical errors are distractions which you don't need. Proofread carefully: don't let sloppiness cost you business.

Be certain to incorporate a succinct executive summary - decision-makers sometimes read only this page.

Again, take a critical look from the audience perspective. Ask "So What?". Test it with "What's In It For Me?".

Select appropriate support materials to bolster your proposition. Include a firm brochure, press clippings, relevant newsletters, and case studies (if you have them) with proposals. Take these along to presentations as hand-outs; for best results, supply a synopsis, too.

When you're making a presentation, don't simply deliver a speech. Plan to use some visual aids and/or props. Slides, overheads, flip charts, and even whiteboards can increase your impact, and help you to keep the audience focussed on the subject. Generally, low-tech visual aides are best: high-tech equates with high-risk.

Try to find time for a rehearsal - even experienced presenters benefit from a dry-run. Before a presentation, **prepare yourself mentally**. Again, "think audience": WIIFM?

When you're presenting, maintain eye contact with your audience. Don't focus on the walls or your shoes: take their cues. If you're really confident with your subject, encourage interactive participation.

Agree an action plan: where to from here? Afterwards, follow up. Expect to have to do more than just present or propose to land business.

There is a correlation between frequency of contact and winning business. Be careful, however, not to harass prospective work sources. Find genuine reasons to get in touch: ask for feedback, offer further information, and suggest referees.

Even the most successful proposal or presentation is only the beginning: you've now earned the privilege of delivering your promises.

About the author

Linda Julian is acknowledged as a leading authority on strategic practice development and how to win business for law firms. Since 1979, she has consulted with lawyers and other professionals throughout Australia, New Zealand, the Pacific, and Asia on a wide range of business acquisition, client retention, and strategic management issues.

Her book *The Passionate Professional: creating value, success, and prosperity* has sold in 13 countries and has received wide acclaim. Linda lectures in strategic management and marketing professional services at post-graduate level. She leads the small and highly specialised Julian Midwinter & Associates consulting practice.