

## Sound Off:

# Margi's Mayhem & Dooley's Dogma, Part II

*In the April 2001 Marketer, a fictional case study was presented about Margi Simms, a proposal coordinator who provides marketing support to nine project managers. Partner Jacob Dooley, the most difficult one, asserts, "The more we submit, the more we win." His success rate is 20%. Dooley often "inks up" a previously submitted proposal without ever visiting the proposed project owner. Margi is under internal pressure. Other project managers ask her to be creative with their proposals. Some question Dooley's pre-emption of her time. Margi informed the firm's president of her frustrations. The president's response, "Work it out with the project managers and do the best you can. You are doing such a great job, Margi. Please, more of the same." Margi wondered how much "more" there was.*

We asked **Dan Safford**, author of *Proposals: On Target and On Time*, to review Margi's situation. He offered these thoughts:

"Margi's biggest challenge is to get Dooley—and everyone else—to view her role in a different light. She needs to be seen as a valued participant in the process, not just a proposal machine. A good way to start is for her to provide tools that help make it easier to write winning proposals. First, create a form into which Dooley (and the other doer-sellers) plug in marketing intelligence. Headings should include:

- 'What are the details of the upcoming project we are going to propose on?'
- 'Who are the main decision-makers in the client's shop?'
- 'What are their hot buttons?'

"This form will give the project manager a set of leading questions that prompt him to think in detail about the client. This will lead to more client-focused proposals (and maybe a no-go decision!). They have to use the form, and that's Margi's biggest challenge. She has to be firm with Dooley and say, "I'm very busy right now; I'll e-mail you a format you can deposit your thoughts into, and we can go over them later." She should also set a time when they can meet."

**Anne Benda-Farrell, CPSM**, Dunham and Associates, St. Paul, MN, offered these ideas: "Create a realistic schedule showing proposal/due dates, production requirements for each, and your available time (including overtime—see graphic at right).

"By each proposal, identify fees, past relationships (if any), and estimate the short-list probability. If a client is delinquent in paying, note it. Do your own mini 'go/no go' process; make recommendations. Develop a schedule with Dooley. If schedule is unattainable, Dooley must prioritize."

**Anthony Rimore**, Senior Vice President, Arquitectonica, New York City, responded: "I agree with Dooley. Margi should ask for more staff; marketing support people deal with deadlines every day, not just once or twice per month. Dooley should be more self-sufficient and aware of Margi's tough job. No one likes confrontation, but Margi's job will not get better unless she makes it better. In many cases

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Workday Task	Monday	Tuesday	Wednesday	Thursday	Friday
Margi's Hours	9.0	10.0	10.0	9.0	8.0
P-ABC School					
F-\$120,000					
D-Tues 2:00					
T-12 hours					
PR-Excellent					
C-80%					
P-XYZ School					
F-\$100,000					
D-Wed 10:00					
T-2 hours *					
*Assuming we can reuse info from ABC					
PR-Good					
C-50%					

P=Proposal Name; F=Fee; D=Due; T=Time Needed to Complete Proposal; PR=Past Relationship; C=Chance/Probability of Being Awarded Project. Any additional notes.

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proposals serve to get you to the short list. They are then thrown out, and the interview/fee win the project. These proposals don't have to be as tailored or complete. Responding to a large number of proposals is a business development tool, not to be confused with the proposals that are for projects you have done your homework on and have a good chance to win. Your chances may be slim, but you might get short-listed. This will position you with key decision-makers for future opportunities. In these cases only, a proposal that uses tried and true boilerplate with beautiful graphics may work. Look at the big picture in these cases—win ratio is not important. Even if there are mistakes, let's face it, nothing is deader than an old proposal—people don't hold on to these things like the family bible.”

**Lisa Fingar**, Marketing Coordinator, SWBR Architects, Rochester, NY, shared these thoughts: “Margi should prepare a report that identifies proposals by project manager. List all costs involved for time, graphics, reproduction, etc., for each proposal. Identify the win rate for each partner/project manager. It will be an eye-opener to see the cost versus new work success. We were most

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successful on those proposals we invested in versus those we just ‘churned’ out. If Dooley could see how much money he was spending on proposal preparation versus his hit rate in comparison with others in the firm, it may help him understand Margi's desire to be more selective.”

Most readers agree. Proposals need to be customized, prudently organized, well written, and highly attractive to place a firm on the short list. It takes specialized talent and time to produce quality documents. More may not be better; only “better” is better. Good luck to all the Margis! ■



About the Author  
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