

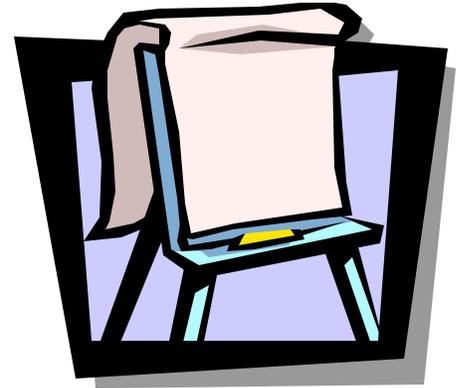


## MAKE THE MOST OF YOUR SHORT LIST PRESENTATIONS

BY STEVEN R. KELLER, CPP

Nothing is more exciting to the entrepreneur than to learn that an important potential client is considering the firm for a major project. But unless he possesses certain entrepreneurial qualities, such a prospect can be a frightening thing. Being on the "short list" often means that it is necessary to make a written and verbal presentation to the Owner, explaining in a concise way, what your firm has to offer the project; why you are unique in your field. More times than not, the Owner can accept any firm on the list. He's only looking for the firm with "just the right qualities". It can be very stressful having to convince the Owner that your team, a diverse group of individuals that you may barely know, is the right team with the right qualities.

As a consultant to architects, I have been on many teams, and I have observed and participated in many presentations. Many consultants and engineers have been members of a large number of teams. I've made several observations that are worthy of being passed on to colleagues who may find themselves on a short list and facing a presentation. The first observation is that the lower you are on the totem pole, the more likely you are to have observed a variety of presentations in the recent past; the



more likely you are to know what the current "state of the art" in presentations to clients is.

The principal of an architectural or construction firm, the top of the pyramid, so to speak, often has been with his firm for many years. While he has probably made many presentations, having been on many short lists, it is likely that the only presentations that he has actually seen in recent years are those of his own firm. The project architect, however, may have transferred recently from another firm and may have experience with presentations in at least that one prior firm. The consultants, electrical and mechanical engineers, and others at the bottom of the pyramid, work for many architects on many projects and are more likely to have seen a wide variety of presentations by a number of firms.

The second observation that I have made is that the person most capable of advising the team leader on the type and format of presentation to be made is rarely, if ever, consulted. The

*Steve Keller is a security consultant specializing in museums, cultural institutions and historic sites with headquarters at 555 Granada Blvd. Suite G-3 Ormond Beach, Florida 32174 Tel. (386) 673-5034 Fax. (386) 673-5208 E-Mail [steve@stevekeller.com](mailto:steve@stevekeller.com)*



principal of the architectural or construction firm or a high ranking member of his team is usually in charge of the program and he rarely consults with the other members of the team on what course that presentation should take.

A third observation that I have made is that while the principal of a firm may have impressive credentials and may be a truly great architect or contractor, that does not mean that he is the best person to serve as chief spokesman and moderator of the presentation when his team gets their 60 minutes to make its best impression. And, in conjunction with this observation, I have noted that the principal of the firm, in fact, does most often, lead the program.

As one who has observed a wide variety of presentations by a number of firms, large and small, I would like to offer some tips. Let's assume that we are discussing a presentation to be made in regard to a significant project. While a significant project may be a multi-million dollar fee for the larger firm, it may be substantially less for a firm that is on its way up. Either way, the project we are discussing obviously has to be worth expending the effort and expense I am proposing. It is my opinion, however, that every firm that is on its way to the top has projects that should be regarded as important, regardless of their size.

Too often, I am invited to the presentation by the project leader at the last minute. The consultants and engineers who hope their team will be

selected for the project by the Owner were selected by the architect because they have unique knowledge, skills or credentials that make them important to the team. As a group of businessmen hoping to capture a major assignment, we all often pay our own expenses from our office to the point of the presentation, sometimes across the country. When we are invited at the last minute, we cannot always take advantage of Super Saver and discount fares. We can not always clear our calendars. Consequently, last minute arrangements that do not permit the entire team to assemble can hurt the presentation. Every team member should be present. Further, last minute arrangements often prevent the out of town experts from arriving the night before, and early arrival is necessary so that a dry-run of the presentation can be held.

With proper planning, each expert can be asked to prepare documentation regarding his firm's expertise and experience tailor-made to the project under consideration. Materials submitted by each expert should be attractive, concise and informative. Emphasis should be on similar work performed, professional standing of the expert such as certificates or degrees held and professional papers presented to peers. The materials should emphasize the unique skill and experience that this team member brings to the project. It is a good idea if the architect maintains a written guideline for these presentations so that the consultant can comply with your wishes. If you



want it typeset or printed on a particular word processor program, say so. And for Pete's sake, don't specify a specific software program just for the sake of doing so. I use Macintosh, like many museum consultants do since Mac is the platform of choice for our clients. If you use DOS, I can translate to your program but I may not be able to produce a finished presentation document with multi-columns overnight. I CAN give you a disk prepared in, say, Microsoft Word, that you can print out in WordPerfect if that's your choice program.

The architectural or construction firm must decide how badly it wants this project and how much time and effort it will invest to win it. I've seen truly major projects--often the largest project for which a particular firm has ever been considered--lost for lack of a good presentation. Often, the firm wanted the project badly, but made no effort to commit time and resources befitting a project of that importance.

If the firm does not have a person on board who is trained to make presentations of this magnitude, they should hire someone. Every city has a number of public relations and communications firms which can help prepare a presentation. Certainly if your firm makes more than two presentations per year for projects, it is cost effective to have a program prepared that can serve as the basis for your presentation each time.

Who should moderate the presentation? That depends upon your firm's capabilities. If I were principal of a

firm in such a situation I might try to serve as moderator myself, but such presentations are my forte. Unless you are a professional communicator experienced in communicating with the type of audience you are being called upon to brief, you are well advised to delegate the program to someone else. While I feel that it is important that the principal of the firm be present and be involved in the program, it is not necessary for him to write, direct and moderate it. He can appear to be in charge while sitting back and letting a professional communicator do the work. We've all been to trade shows and visited product booths. But are you aware that most of those attractive, articulate presenters are simply actors who memorize hundreds of pages of materials (that's their specialty as actors who memorize scripts for every job) and can tell you everything you might need to know about the product. Image DOES count.

One observation I have made is that the visual aids that I often see in such programs are totally inadequate. Just because someone is an artist doesn't mean he can paint a picture and just because you have graphic display boards prepared professionally doesn't mean they are attractive. Every firm should have display boards showing photos or drawings of previous projects. They should be graphically concise and attractive. And they should not be too technical for a layman to understand. While a fellow professional may appreciate your detailed blueprint, the people making the decision on who to hire are too often laymen, bureaucrats, or



administrators who are more easily swayed by a pretty picture than a technically impressive blueprint. But in preparing your graphic displays, shop around. All sign shops and graphic art firms are not created equal. Find one that can give you the quality you need. Look at previous work. Firms that specialize in preparing displays for trade shows can often be counted on to do a good job for you. They can also prepare carrying cases for your displays so that out of town presentations can be handled as well.

Your program should be ready to go in several formats. Start now to plan for your next presentation by preparing presentations about your firm that can be made using color slides, overhead projection cells, or video tape as well as display boards. You never know what format the owner will dictate and you need to be ready. If they invite you to bring slides--and they often do--you are ready with slides that explain who you are and what you can do. If no slides are permitted, you can place display boards on easels and use the displays in your program. Verify exactly what equipment will be available to you. Ascertain if the Owner has a preference in presentation format. I would even go so far as to bring my own projector (and spare bulb) to make sure that nothing goes wrong. If you have your slides prepared on a computer and made at a service bureau, they can usually provide overhead projection transparencies as well giving you a choice of presentation mediums. My firm has its own Macintosh software package that

enables us to prepare presentation quality slides with graphics, charts and tables in 16 million colors in 35mm and overhead projector format with a 24 hour turn around. We can even do video.

You may want to consider having your entire presentation converted to laser disk in various formats. This allows you to present any data in any order instantly without delay on a TV screen with a click of the remote control.

Decide if a professional presenter is necessary. If so, make sure that the spokesperson is right for your firm's image. You are not looking for a pretty face. But, like the trade show presenters, there are attractive and pleasant looking people who do nothing in their careers but memorize extensive presentations for companies and present that information in a very pleasant, convincing manner, leaving you to field technical and specific questions.

Should you prepare a presentation using a spokesperson, it might begin with the spokesperson introducing him or herself to the owner's reps and jumping right in with a presentation on your firm using slides or other materials. This spokesman should introduce himself as being from your "client relations department" or some similar unit. After a brief presentation overview, the spokesman can introduce the principal, providing an impressive explanation of his credentials. Too often, when the principal is the moderator, he feels that



he cannot boast his own expertise, and, he is often the only one who is not properly introduced to the decision makers present. He is often the very one whose past accomplishments should be emphasized.

After making a very brief presentation, the principal should again turn the program over to the spokesperson who should introduce the experts and explain their role in the project. Be certain that you work out the introduction with the consultant and engineers in advance. I have been present at meetings where I have not been introduced at all, where I have been introduced with inaccurate information, and where I have been introduced using irrelevant information that did not maximize the contribution that I would play to the team on this project. The team member knows his background better than you do. Let him help with his introduction. But above all, YOU or your spokesman should introduce him. He should not introduce himself. This is a one shot sale. That introduction is all-important. If he blows it, he has blown a major opportunity. The professional spokesperson should maximize that opportunity for you.

Be careful when selecting that spokesperson. Take time to actually audition the person. Remember that you will have to provide some training for him. If he is unfamiliar with the process or with the architectural or construction world, he will have to be briefed so that he will not sound like a professional spokesman but rather a professional communicator who is part

of your firm. It is best to use a small, local consulting firm which regards you as a good client. This will enable you to use the personal services of the principal of that firm rather than an employee. Employees come and go and you do not want to train new employees for each presentation. The principal of the public relations firm can gain experience with each presentation.

Slides should be professionally prepared. If your intention is to show slides of previous buildings, be sure that they are photographically acceptable. For example, lighting and color should be consistent from slide to slide. Even the weather in the slides should be consistent. There is nothing worse than trying to impress an Owner about your skills in designing or building a beautiful building, if the slide is so poorly done that the good impression is lost. If necessary, hire a photographer to photograph each site, under your direction, so that each feature that you wish to be seen is maximized. If there is a sound track, use a professional announcer. Your local radio station or a talent agency can provide a pro on a contract basis. Your public relations firm can also guide you on the preparation of graphic or title slides which should be professionally prepared using color, typeface, and design to their maximum benefit. Remember, you, as the architect or contractor, may be judged for your artistic or other talent by how this presentation appears graphically!

If written company or project materials are distributed, have sufficient copies! Ditto for the materials that are



to be passed out pertaining to each consultant or engineer. The material that I've seen varies from excellent to very very poor. If the project is worth going after, it is worth going after aggressively. Your written material should never be printed on dot matrix computer printers, and it will convey a much more professional appearance if it appears to be typeset in a typeface that is clean and crisp and distinctive from that used on a typewriter. If you photocopy your material for presentation, use a machine that makes a good clean copy. If your machine is not operating well, send the material out to be copied. Each person should have a supply of business cards ready for distribution, and should bring company brochures that you have previously reviewed and approved. I don't believe that I've ever attended a team presentation where every team member had remembered to bring his business cards!

Be careful in asking consultants to make a presentation. No matter how emphatic you are about setting conditions for these mini-presentations, consultants and engineers who fly in at their own expense tend to talk longer than the two minutes allotted to them! Insist that they limit their presentation, and you define the information that they are to attempt to impart in the limited time period. It may be more effective for you--or your trained spokesman--to interview them and have them respond to specific questions. And while it is risky for me to offer this following advice, I must do so: It is not necessary to give each consultant the same

amount of presentation time. If you sense that the owner is placing a greater emphasis on a specific specialty or concern, capitalize on that by grandstanding your expert in that field. Give each expert time, but give the "important" ones more time. Now this may be risky because you may not recognize the importance of each specialist. As the security consultant, I am often at the bottom of the architect's list, but high on the priority list of the Owner. Very often the architect realizes the importance of security concerns only during the question and answer period. So be careful in trying to assess the emphasis and priorities of the Owner. I was involved in a museum project where a small auditorium was a minimal part of a major high rise museum facility, yet the acoustical consultant spoke longer than the gallery designer. Of the dozen Owner's reps present for the presentation, one was the insurer of the collection and the other was the Security Director. But the architect lost valuable leverage by not emphasizing the concern he had for security and the fact that he had gone the additional mile of including a prominent security consultant, not just a local alarm company, on the team.

It will be necessary for everyone on the team, from the principal of the architectural firm to the consultants, to make a verbal introduction. They should be dressed appropriately. They should be well groomed. I've seen landscape architects show up in dirty jeans and muddy boots, and I've seen project architects show up for presentation with a museum board of



trustees wearing “New Wave” “artsy” clothing more or less resembling a Zoot Suit. While the museum curator may be “artsy”, the Board of Trustees is usually made up of bankers and tycoons in three piece Brooks Brothers suits.

From time to time, a very important and talented member of the team will have difficulty communicating due to a language problem. I sat through an entire presentation by an architect whose thick foreign accent was so distracting that no one really knew what he was saying. He would have been better off taking his bows and answering questions, leaving the verbal presentation up to his spokesperson or project architect. In one presentation the electrical engineer had such a thick Chinese accent the Owner actually asked how we could communicate with him with accuracy.

When you are invited to a presentation, attempt to ascertain exactly what the owner will want to hear. Get details. Who will be present from the Owner’s team? If, for example, the Owner’s security director is to be present, that tells you something about the priorities of the Owner. What is the background of the team members? How often do they see these presentations? If they are government procurement people you have a different problem than if they are the members of the Ladies’ Association of the City Hospital. These groups are obviously more difficult to address than a group with technical expertise who will want to know about your technical skills or approach to

construction related problems. Also try to find out who is on the “short list”, competing for the job with you. Then, see if any of your firm’s employees or anyone representing one of your consultants’ firms has ever been on a team with any of the competitors. What can you expect from their presentation? More important, who is likely to be on their team! If they have a prominent team member, you may have to compensate by emphasizing the skills of your team member in the same specialty.

Since I work extensively in museum security and have worked on many major museum projects with the major players in the field, I've never been asked by an architect what he might expect from the competition with regard to the presentation.

As soon as you learn the details of the presentation and the identity of the Owner’s representatives, pass this on to the members of your team. Help them to prepare a presentation or to be ready to respond to questions by citing previous projects of a similar nature, or by explaining how they addressed problems of a similar nature in the past. Be sure that all of your team members know the vocabulary of the project. I once began an in-depth discussion of the need to protect “historic fabric,” and how we would go about doing it during a project involving a major historic site, when I sensed that this would be a high priority of the Owner. By causing the subject to be addressed, we showed our team’s ability to deal with the problem. Then, a talkative engineer



chimed in and, by his comments, made it clear that he thought we were talking about protecting the building's fabric curtains and carpet!

If you are asked if you have a preference for a presentation time, it is best that you choose a later time slot. Giving your consultants the morning to fly in is useful if they cannot come the day before, but still try to get them in to town early. Schedule a dry run of your presentation in the morning, and coach anyone who needs help in meeting your high standards. After the program, critique the presentation for input on how you have done. If any member of the team feels that major points were not made, it may be appropriate to immediately follow up with clarifications to those in attendance.

The preparation of a basic program about your firm that can be presented in several formats by a staff member or a professional communicator provides a nucleus around which you can build a tailor-made presentation to owners on a variety of projects. Graphic materials, such as display boards, handouts or brochures, should be professionally produced. And your spokesman should be knowledgeable about the firm and the process that owners use in selecting their team. High ranking members of the architectural team do not have to feel that they should make the entire presentation themselves. While they may be the most knowledgeable people on the team, they may also be unprepared for the presentation. Use them only for the

important parts of the presentation requiring their personal touch. Control your team members. Rehearse them and make certain that they respect time limitations. Use the question and answer session to bring out important information. If the owner doesn't ask the right questions, skillfully and diplomatically make sure that the topics are addressed. Leave printed materials that make the best possible impression. Your presentation should be crisp, animated, and energetic. It need not be stodgy and formal and should be tailored to the audience. A properly designed presentation package can be "customized" for each presentation by adding or deleting certain slides.

It is a fact of life that the best man doesn't always win. Our society relies on packaging and presentation. Owners do, too. Often, they have decided prior to the meeting that they could accept any team on the short list. Now, through the presentation, they are seeking the team they feel most comfortable with--the team that thinks like they do: The team with creativity, ideas, and energy. Use your presentation to convince them that your firm is the firm they are seeking.