



Published in:
Proposal Management, Spring/Summer 2004

Orals Coaching: The Secret Weapon for Winning Contracts

By John Parker Stewart & Daniel Stewart

The fight to win and keep government contracts is an intense and unforgiving business. In the present and future market place, competition for contracts will only increase, especially as government funding rises. Because of the war on terror and the effort to recapitalize the armed forces, government funding will grow. In fact, it is estimated that those seeking Department of Defense contracts will collectively increase their Bid & Proposal budgets by over 600 million over the next five years.¹

To effectively compete, contractors must use every resource they can find to successfully win contracts. Currently, the government is strongly emphasizing a less traditional method in the proposal process: an orals presentation. Preparing for the orals presentation is a must for a successful capture. Thus, orals coaching has become the secret weapon to win and keep contracts.

This article describes the increase in orals requirements in government contracting, how contracts are officially and unofficially won, what orals coaching offers, how to hire the right orals coach, the content and instruction that should be offered by an orals coach, the orals coaching process, a case study of a successful orals coaching experience, and a call for action.

A New Type of Proposal

Typically, a Request for Proposal (RFP) is announced and a large, comprehensive, written proposal is prepared by those seeking the contract. However, the sole reliance on a single written proposal is growing out of style. This is partially because written proposals involve a long and costly process for both government and industry.

Also, reliable studies have shown that, due to the complexity of today's proposals, the average selection board member generally does not understand 75 percent of what he or she reads in the proposal.² Because of the challenges associated with written proposals, government agencies are placing more emphasis on untraditional methods for awarding contracts.

Stewart Systems, Inc.

PO Box 1527

Lake Oswego, OR 97035

v 503.638.1106

f 503.638.4803

www.johnparkerstewart.com

John Parker Stewart has been providing expert orals coaching and proposal management consulting to companies such as Boeing, GE, Hughes, Lockheed Martin, Raytheon, and the United Space Alliance for the past twenty-six years. John is based in Portland, OR: jps@johnparkerstewart.com.

Daniel Stewart is a communication and organizational development specialist consulting and improving performance at companies like Avaya, Deloitte & Touche, and Starbucks. Daniel is based in Boulder, CO: 303-530-0685, daniel.stewart@johnparkerstewart.com.

While a comprehensive, written proposal is still often expected, an additional method, the orals presentation, is quickly becoming a standard feature of the evaluation process. In fact, a General Services Administration executive recently estimated that over 70 percent of solicitations for programs valued at \$10 million or more will have orals requirements, with the orals counting an average of 40 percent of the evaluation.³ And orals proposals are inline with the revised methods advocated in the new Federal Acquisition Regulation Part 15 guidelines.⁴

“A General Services Administration executive recently estimated that over 70 percent of solicitations for programs valued at \$10 million or more will have orals requirements, with the orals counting an average of 40 percent of the evaluation.”

The following statement from the Department of Energy’s web site, confirms the shift to orals proposals: “Procurement and program staff who have tried this [orals] approach have found it to be an exciting and effective way of doing business and have become advocates for the use of oral presentation techniques. For instance, the Internal Revenue Service has identified a second, high dollar value requirement for information technology services that will rely on oral presentations. The Nuclear Regulatory Commission is moving forward to incorporate oral presentations in many of its routine requirements. The Department of Energy has targeted four solicitations, including a multi-billion dollar management and operating requirement and a requirement using two-step sealed bidding, as candidates for oral presentation components. These pioneering efforts can only further reinforce the viability of oral presentations.”⁵

In contrast to written proposals, oral proposals more effectively convey the contractor’s technical approach, management experience, and past performance. Orals reduce procurement lead time and administrative costs for both government and industry. Most important, orals help the selection board visualize a relationship with the potential contractor, providing a clearer picture of the contractor’s adaptability, competence, and responsiveness. The selection board is able to evaluate the key members of the potential contractor and gain deeper insights into the proposed technical and management approach. Orals address the factors that really win contracts.

How Contracts are Really Won

Every proposal has a set of standard guidelines that establish the criteria that describe how the vendor will be chosen. These guidelines usually always focus on vendor’s past experience with similar projects, technical approach and cost, and management experience. Much of the written and oral aspects of a proposal emphasize these three areas. While these are essential components for creating successful capture, they only tell half of the story. The actual criteria that win contracts are usually far less objective and center on the communication and people skills of the presentation team.

The unofficial reasons why contracts are awarded are: open communication between source selection evaluators and orals teams during the presentation, the cohesiveness and competence of the orals team, the customer’s ability to understand the proposal, a professional and concise presentation, clearly designed and

presented charts, properly highlighted discriminators, and the ability to speak persuasively. Unfortunately, many of these key behaviors do not come naturally to a highly focused team of technical experts. It takes dedicated coaching to help engineers and scientists become adept at building relationships of trust, speaking with persuasion and passion, and designing a presentation that connects with the selection board.

“Today, more organizations hire external orals coaches.”

Orals Coaching Matters

The bottom line for business development is that the orals coaching matters, and will probably determine the outcome of the entire contract. In response to the importance of the orals proposal, organizations have begun to invest in orals coaching to effectively prepare the orals team.

Organizations realize that the orals team represents the company and can project a positive or negative image based on the perceived cohesiveness and competency of the team. Thus, contractors who want to win contracts engage an experienced orals coach. As a general rule, *teams who have an orals coach win more contracts than teams without such guidance.*

How Do You Select an Orals Coach?

When it comes to selecting an orals coach it is a decision to select an internal or external coach. An internal coach is less expensive and, if properly trained in presentation skills, can do a good job of coaching individuals in improving their public speaking skills. Internal coaches will often know the culture and the significance of the contract to the organization; they may be more committed to the project. The downside of an internal coach is they often lack specific training experience, usually have not had in depth exposure to the proposal process, and lack objectivity. They are often too close to the project to offer objective recommendations on highlighting discriminators or crafting visuals that really connect with the customer.

The other choice is an external orals coach. Though significantly more expensive, they usually provide extensive amounts of expertise and experience. Many external coaches have proven track records of teaching presentation skills and have a variety of satisfied clients. External coaches may have consulting experience in teambuilding or leadership development that can help build a strong presentation group. Because of their exposure to the orals process from multiple clients, they have an industry-wide perspective. They know how to direct the intense orals coaching process of selecting team members, developing individual presentation skills, creating a cohesive team, highlighting discriminators, and continually practicing until the presentation is flawless. In addition to presentation coaching, orals coaches who have a background in teambuilding bring a highly valued skill set in developing an effective orals team.

It all comes down to the type of contract you seek to win, the likelihood of you winning it, and how important the contract is to your organization. When a contract is small and peripheral to the organization's strategic focus, using an internal coach is a logical choice. When a contract is large and highly significant to the

organization, external coaches are typically engaged. Today, *when an organization wants to win they usually go for experience and hire an external orals coach.*

No matter what type of orals coach is hired, internal or external, the coach should have the experience and capacity to offer the client two important things: (1) deliver the needed content and instruction; and (2) understand and use a tailored coaching process.

The Needed Content and Instruction

An orals coach should have a tool box of knowledge, skills, and abilities that he/she can use to coach the orals team. Each orals coach may have certain specialties and interests. A coach should be selected because of his/her match with the requirements of the specific orals team and proposal requirements. The following general list describes the significant areas of expertise that an orals coach can use to effectively train an orals team.

1. Speaking & Presentation Skills
2. Speech Writing & Script Preparation
3. Content Development and Organization
4. Group Practice Coaching
5. Customer Profiling and Analysis
6. Preparation of Charts & Graphics
7. Leadership Development
8. One-On-One Coaching
9. Video Taping & Analysis
10. Question & Answer Preparation
11. Credibility & Presence Development
12. Rapport Building Skills
13. Team Cohesion

The Orals Coaching Process

An orals coach needs to use a process that guides the coaching. Using a process prevents mistakes and important aspects from being overlooked. Having a process also suggests that the orals coach knows what he/she is doing and knows what it takes to make a winning orals team. An orals coach should consider the specific needs of the orals team and the organizational expectations when crafting an orals coaching process. The usual orals coaching timeframe is 4-6 weeks of full-time effort. The process below offers a general outline of a typical orals coaching process.

1. Quick study the situation (RFP, customer needs, history of contract, special circumstances)
2. Assess individual and team capability
3. Develop presenters into a cohesive team
4. Video tape each presenter to determine initial strengths and weaknesses
5. Identify and emphasize key discriminators
6. Design coaching plan and schedule
7. Monitor design of all charts and visuals
8. Coach for presentation at pink team
9. Extensive team and one-on-one coaching with video feedback
10. Prepare for red team
11. Polish presentations using video feedback
12. Finalize plan for delivery to source selection board

A Successful Orals Coaching Experience

To illustrate an orals coaching process and the variety of skills needed by an orals coach, a real life example is offered. The following story is a personal orals

coaching experience from one of this articles co-authors, John Parker Stewart. Because the narrative is told in the first person, it provides clear insight into the expectations one can have in working with an orals coach.

John relates:

“I received a call from an east coast client who was very concerned about the orals phase of a lucrative contract that was a ‘must-win’ in their business plan. It was highly classified work with DOD.

“I arrived and immediately went into data gathering mode by interviewing all the key players. This gave me the history of the contractor in this arena, the overview of the RFP, the capabilities the client had, and their view of the competition.

“The next step was assessing each member of the proposal team, their background presentation skills level, and determine the degree of their collective cohesion. From that assessment, I worked with the proposed program manager and selected the principal members of the orals team by interviewing and observation. When this group of seven (plus two alternates) was finalized, I spent three days molding them into a unified team by letting them experience real, measurable synergy through several team exercises. Over the course of those several days, the team gelled together and each member began to support each other as they learned of each other’s strengths and weaknesses. Obtaining this level of understanding and cohesion is the first essential plateau of creating a successful orals team.

“The coaching process continued as I placed each team member in front of the camera. I use extensive video feedback, so it is helpful to get each person comfortable with the technique early on. This initial video taping session not only gives each person greater self awareness and helps them overcome initial speaking anxiety, but it also helps them feel at ease with me as their coach.

“While the team building and camera work was happening, I concurrently worked with key members of the proposal writing team to determine and highlight essential discriminators that we could emphasize graphically and orally. The client valued the external and objective perspective I brought, since their in depth knowledge of the project sometimes hindered a big-picture view.

“Once all of this needed groundwork was laid, we developed a schedule. The orals preparation timeframe identified the dates for the pink and red teams and included flexibility to cater to customer changes. Because most of the orals members were also key players in the proposal team, we had to frequently adjust the scheduled times for the oral preparations, and the times allotted, to design the charts for the final drafts of the written pricing and tech volumes. I was also concerned about maintaining the health of each team member, allowing for adequate sleep and a decent diet whenever possible. Much like any orals coaching experience, this stage ended up being a day/night marathon—bordering on exhaustion.

“As the heavy pace continued, we intensified the focused one-on-one video coaching in preparation for pink team. For a ten-day stretch, we met as a team twice a day and practiced speaker order, smooth transitions,

emphasis, chart familiarity, and spotlighting discriminators. In between the two meetings and during the evenings, rehearsals and peer critiquing occurred.

“Once the critiques from pink team were all digested, we applied the suggestions and moved ahead in preparation for red team with the same zeal and demanding schedule. In the video coaching we relied even more on peer coaching. The quality I desired was beginning to emerged.

“Red team went well with more positive than negative feedback. Now it was a matter of polishing the entire multi-hour presentation. We started spending considerable time rehearsing for Q & A. We studied the individuals most likely to sit on the source selection board and the questions they would most likely ask. We also analyzed all possible ‘Murphys’ that could go wrong at any stage. In view of these ‘Murphys,’ each presenter had been assigned a back up from the beginning. Each presenter and his/her backup spent considerable time together rehearsing. I required a few team presentations with only the back-ups. At this point, we were practicing seven days a week.

“Around this time we were hit with schedule changes from the customer. That was a real challenge since the team also had “real” jobs that were waiting for them. The falling dominoes of major time adjustment had to be worked out and it wasn’t easy. We had previously learned where the orals would be held and were able to get into the room at night to observe the surroundings. From this intelligence, we recreated the room on our premises and had our dress rehearsals there. This included placing masking tape on the floor indicating walls, fixtures, and barriers. Then we duplicated the positioning of tables, chairs, risers, electrical equipment, doors, and windows. It was our ‘war room.’

We even had a wardrobe check one week prior to the event. Some team members had never owned a suit or tie nor did they know what shoe polish was. All that changed.

“D-Day finally arrived. The team performed tremendously well! I was so proud of them. The only glitch was a spilled glass of water on an important cue card. Luckily, the 3x5 ‘cheat sheet’ note card was laminated—one of a huge list of our ‘Murphy Contingencies.’ We had tried to anticipate anything that could go wrong and our efforts worked.

“After the event we celebrated with a big meal. A feeling of accomplishment hung in the air. We were confident we had done the needed job. The team was exhausted but relieved.

“Weeks later they learned they had WON! Intensely working day and night for six weeks had paid off. Because of their efforts, their company was awarded a \$400 million job, over a 3 year period, with 5 renewal options. It also opened the door for more contracts with the same customer. The coaching process was demanding, but it brought great results. It was all worth it!”

A Call for Action

Orals requirements are now the norm in government contracting. Some proposals don't even ask for a written component any more. Successfully capturing contracts will now increasingly depend on an effective orals team presentation. Orals coaching has become the secret weapon for winning contracts.

So, it is time to get moving. Look at your future contract needs, talk to your business development department, and when there are orals requirements, push for a quality orals coach. There are several experienced orals coaches out there helping organizations capture contracts. Engage one; it may be the deciding factor in winning your next big contract.

¹ DeVore, C. & Moler, T. (Fall/Winter 2002). "US Department of Defense B&P Expenditures on the Rise," *Proposal Management*, 11-12.

² DeVore & Moler (Fall/Winter 2002).

³ <http://www.orgcom.com/newsletter/newsletter2.html>, retrieved on Oct. 27, 2003.

⁴ Kausal, B. A. (Sept./Oct. 1998). "Thoughts on Oral Proposals," *Program Manager*, 22-27.

⁵ <http://professionals.pr.doe.gov/ma5/MA5Web.nsf/Procurement/Oral+Presentations?OpenDocument>, retrieved on Oct. 27, 2003.