



*Get your scoping right and you have a head start; get it wrong and you have probably lost the pitch at this point*

## essentials in mastering pitch scoping calls and meetings

***The last few years have created a tough competitive landscape for most professional services firms – one where clients review their adviser relationships more frequently in order to gain cost savings or additional value.***

This has also led to tougher competitive tenders and pitches which increasingly involve procurement professionals as part of the decision-making team. Firms have had to become much more professional in how they respond to request for proposals (RFPs), invitation to tenders (ITTs) and other forms of client brief for new work.

Those who are more successful in such situations recognise that there is only so much information you can glean from the client brief.

To gain competitive advantage you need to:

- uncover insight and information your competitors don't know
- build rapport with the decision-makers ahead of submitting your pitch document and presentation
- know the personal agendas of the decision-makers and influencers so that what you propose fits exactly with what they are looking for.

### So how do you do it?

A key tool to uncovering this information in the pitch process is the scoping call or meeting – a conversation that enables a firm to gather additional insight from the potential client so they are clear on the work required and the factors important to the decision-makers.

Get it right and you have a head start; get it wrong and you've probably lost the pitch at this point.

Assuming that you've had an internal discussion on whether you should go for the pitch in the first place (and concluded that you have a decent chance of winning) the question then arises; how can we engage with the potential client in a way that will help to differentiate us from our competitors during the pitch process? Teams often focus on the document and presentation and ignore the fertile ground of using scoping conversations to gain a work winning edge.

Here are some scoping discussion 'essentials' we share with clients, based on our research into what works in the current market.

# 1 See the scoping conversation as way more than a fact-finding mission

Many firms treat the scoping discussion as simply a fact-finding exercise to enable them to better understand the brief. Highly successful firms, however, recognise that the scoping meeting or call is an excellent chance to build rapport with the potential client, engage with them on their issues and opportunities and demonstrate (through the way they conduct the discussion) that they are advisers capable of delivering the results the client wants.

Scoping will also give you the chance to check the decision-makers' key issues, wishes and opportunities, as well as test out some of your own initial thoughts and ideas.

## Scoping essential:

*Ideally the scoping session brings all the key decision-makers together in meeting with your team- either in-person or online. If diary pressures of the decision makers and influencers make this impossible, then a series of short individual scoping calls or online meetings are a good alternative.*

# 2 Plan carefully

The secret to success in managing the scoping call or meeting, and creating the right impression, lies in the planning. You need to be clear about what you want to achieve and the impression you want to create.

Do your homework and build a good knowledge of the client organisation ahead of the discussion. Analyse their annual report and accounts, read their website and publications, uncover recent press coverage of their latest activities and opinions and gain some insider knowledge of the sector.

Remember that, whilst the bulk of a scoping meeting should be about understanding the client, they will also be assessing whether you 'feel right' for them. As part of your preparation, consider ahead of the meeting the strengths, weaknesses, opportunities and threats that your homework suggests this potential client is facing. Now consider areas of your expertise and approach which could help.

## Scoping essential:

*Prepare a draft agenda and send it to the potential client ahead of the scoping discussion. It should touch on the gaps in your knowledge, or points you need to clarify before you pitch.*

*The agenda should also focus on those areas that make you different and attractive to this contact.*

*Ask the client for their views on the agenda points, and encourage them to add any others they wish to cover. You can also send other pre-discussion reading material if you think the client will value it and have time to read it – it shows that you are organised and keen to engage.*



# 3 Build rapport right from the start

It's important to reiterate that, during any scoping discussion, the client will be weighing up whether they could work with you (or not) and the initial impression you create will greatly influence that decision.

When sending across your agenda, it can be helpful to give the prospective client some background information on the people they will be meeting. Enclosing short CVs gives you the opportunity to start subtly introducing some key messages about your firm's strengths. Tailor each CV to the potential client; don't use an off-the-shelf version.

Whether you're in a scoping meeting or on the phone, you should always thank your contact for allowing the opportunity to speak to them. In introducing yourself, explain your role in your firm's pitch submission and also clarify the time that they've allowed for the discussion – it often changes for senior people so make sure you know and can then manage your approach appropriately. It's also professional to clarify the client is still happy to follow the agenda, and give them the opportunity to add any extra points they wish to make, or prioritise the discussion areas.

## Scoping essential:

*Whilst it is important to follow the agenda, be flexible in exploring any additional information that client feels happy to divulge. This will be helped by you asking open questions to get the client talking as much as possible and always clarifying any points where you are uncertain of.*

*At the end of each agenda point briefly summarise your understanding of the messages and information they have provided before moving on to the next one. This builds your contact's confidence that you are listening and, more importantly, you understand the implications of what they are saying.*

## 4 Demonstrate your strengths in relation to their issues

It is important that you don't try to sell any solutions at this stage as you could propose something based on an unclear or unfounded assumption and put the client off. Instead opt for asking insightful questions that reveal your expertise and understanding of an issue.

Try testing the client's attitude to certain scenarios and examples, to see if that is the kind of approach they are looking for to tackle a particular issue or opportunity.

Recognise that each of your decision-maker contacts is likely to have different priorities in relation to the pitch. Pitch tender-winners plan in advance probing or 'high impact' questions they intend to ask in a scoping meeting. They also plan how they are going to get across the value they can bring to the situation.

### Scoping essential:

*Think carefully about the questions you want to ask.*

*Information gathering questions such as 'How many people are there in your legal/finance etc team?' may be useful to you, but they don't add any value to your contact – they know the answer – or if they don't, they will have to find it.*

*Think instead about questions that will make them think, or give their opinion or perspective. These types of questions will make your contact more likely to provide the insight you are looking for to differentiate your pitch document and presentation from others.*

## 5 Make contact with the right decision-makers and influencers

If you are facing a panel of decision-makers in the pitch, it is important that you try to make contact with each of them to unearth their individual objectives and preferences relating to this piece of business.

The questions you ask, the chemistry and rapport you create, the knowledge and insight you demonstrate in the discussion all blend together to give the potential client a 'snapshot' of what it will be like to work with you. Identify the pitch team member(s) best suited (in terms of personality, approach as well as expertise) to make contact with each of the different decision-makers. Increasingly, for example, we are seeing firms bringing in their own procurement specialists to support the scoping discussions with the client's procurement professionals.

### Scoping essential:

*There is a balance to be struck between demonstrating your*

*keenness to get the decision-makers' perspectives on what they are looking for (and what is important to them) and being a nuisance. Wherever possible, request a short conversation with the likely key decision-makers' – even if the answer is 'No' then at least you will be given credit for trying.*

*Senior people are busy, so if you only get five minutes on the phone with them, think about those questions you really want the answers to... don't be mundane. Demonstrate to the Chief Executive, Finance Director or whoever the senior decision-makers are, that you can operate at their level and have empathy with their situation. How do you do that? With three or four well-formed questions – the answers they give can win the pitch for you.*

## 6 Anticipate the questions you may be asked

As well as preparing the questions you intend to ask the client, anticipate the questions or queries they may pose to you. This will enable you to answer these confidently during the discussion. It will also help to avoid you waffling or coming across as ill-prepared. In preparing your answers, identify what insight you could share or concrete examples you could give from your experience on how you have dealt with similar situations. These will help to further demonstrate your credibility and track-record.

### Scoping essential:

*Brainstorm with your team the 'tricky' questions*

*the potential client could ask. If necessary ask a colleague who is not involved in the pitch to adopt the perspective of the client and put their questions to you.*





## 7 What if the client won't meet?

In some cases the client rules and guidelines surrounding the pitch prevent contact with decision-makers. If you are faced with this situation you have to weigh up very carefully whether investing time in this pitch will make commercial sense to your firm. Consider these questions in your evaluation of this opportunity:

- Is there an opportunity to ask any questions (often clients let firms direct questions via email and share the answers amongst all competing firms)?
- Do we know the decision-makers and have any existing relationships with them?
- Do we know any other suppliers, colleagues or third party contacts who have insight about this client which we can draw on?
- Which competitors are we up against here and how 'embedded' are they with the client?
- What information is available publicly to add to the details in the ITT or RFP?

### Scoping essential:

*If the answer to many of these points is a variation of 'no', your firm may be sensible to politely decline this pitch in favour of others where you have more insight and, as a result, a greater chance of winning.*

## Summary

We have heard of many instances where firms lost a pitch before they had even written a word of their pitch document. Their poorly prepared and delivered scoping discussion put the client off and they were never able to rebuild that lost competitive advantage. Equally we've seen a great number of instances where firms have gained a head start through an excellent, engaging and thoughtful scoping session.

It is therefore important to view scoping as an essential part of the pitching process – and much more than a fact-finding mission. Don't miss out on this valuable opportunity to impress the client. Those firms who fail to conduct scoping discussions with the client invariably come away from pitches empty handed and hugely frustrated that all the effort and time they've devoted to the pitch document and presentation has been wasted.



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