



## **CREDENTIALS&PITCHES :: FROM CONTACT TO CONTRACT**

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Even in a rising economy, credentials meetings and competitive pitches can be seriously scary. In a recession, we need to make sure that every new business opportunity counts. From the credentials and pitches clinics I run throughout the UK, and from what design-buyers tell me, it seems that many design companies could improve the way they go about it. Here's my Top Ten Tips. First, credentials.

1. If you think of 'credentials' as 'presentations', you are bound to go wrong. They are sales meetings. Many design companies spend far too much time talking about themselves, when they should be having a business discussion around the prospect's needs. Focus on what clients want to hear, and not on what you're desperate to tell them, and allow plenty of time for discussion and questions from both sides. What's at the top of the list at the moment for clients? The effectiveness of design interventions, and reassurance about processes: these add up to perceived value and will help to deflect concerns about price.

2. The presentation element itself often goes a bit like this: (i) Hello, and thank you for seeing us; (ii) We are based in a town, employ a number of people, have been in business for years; (iii) Here's our clients; (iv) Here are some case studies; (v) Any questions, here's a print-out, thank you, goodbye. Sound familiar? Then please read on. Trust me: after endless 'me, me, me' presentations like this, clients can lose the will to work with designers at all.

3. There is no substitute for good research and preparation (and no excuse for not doing it now it's so easy). Find out everything you can about the prospect's company or organisation and its marketplace. Ask the main contact in advance what the main issues are, and what they'd like to get out of the meeting. Once you are in the meeting, use that research to ask questions which uncover and clarify their needs.

4. Selling really isn't difficult. Good salespeople sell without anyone ever noticing. How? They do their research, they uncover and clarify the other person's needs and then they match specific benefits to those needs. If you aren't confident about your sales skills, invest in some training.

5. The sole purpose of casework in a credentials meeting should be to demonstrate benefits and results which are specific to that prospect. Too many design businesses concentrate on what they are, and what they have done rather than on what they could do for the other person.

And what about competitive pitches, paid or not?

1. Do everything that you'd do for credentials meetings, but much, much more thoroughly: the research, the thinking, the preparation, the team rehearsals. Brush up your presentation skills if necessary.
2. If there will be prospects at the pitch who were not at earlier meetings, include some (brief!) information about your company and summarise any past discussions.
3. Mention creative or strategic routes you've considered along the way, and give your reason for rejecting them, especially if they fall into the prospect's comfort zone. It's galling to see another company appointed on the basis of work you've discarded.
4. Make sure that your offer, whether it is expressed in creative, strategic or process terms, meets the brief exactly. An obvious point, I know, but the adrenalin generated by a competition can sometimes take us off into wild, blue spaces.
5. Leave-behind documentation should be comprehensive: not just images of creative work and a few bullet points. It should also be clear to anyone who wasn't in the meeting, and should contain a rationale of why you are perfect for them. Include photos and brief role descriptions of your team: after several meetings in a few days, prospects have been known to get people mixed up.

Throughout the process, the encounter doesn't just last for the duration of the meetings. Your behaviour in advance and afterwards will impact on your likely success. Build rapport at every opportunity, and demonstrate service. And watch your manners. Yes, you did read that last word. There are times when we're less and perfect and the outcome is predictable. 'If they behave like that now', the clients think, 'what will they be like once they've got the business?'

Finally, if you think you've failed when you're not appointed after a credentials meeting or a pitch – one word. Database. You haven't failed: you've succeeded in getting onto the shortlist, and you've started to build a useful relationship. As we all know, it can take years to get from contact to contract. Be patient, be consistent, be visible. Keep in touch.

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