10 Tips and Tricks for RFP Oral Presentations

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Oral presentations in the Government procurement environment continue to be a viable method of evaluating a team’s capability and suitability to perform on a program. We’re still seeing many types of oral presentations including volume-replacement presentations, sample task presentations, summary presentations, and “pop quiz” presentations. In this month’s feature, I’m taking a “Back to Basics” approach to review ten items that can help make your oral presentations successful and your presenters more confident.

#1 Start with the Requirement. Just like any proposal written volume, shred the customer’s requirements paying attention to the language used in Section L (Notice to Offerors/Proposal Preparation Instructions), Section M (Evaluation Criteria), and any supporting documents like Section C/J (Statement of Work/Performance Work Statement), Section H (Key Personnel Qualifications) etc. Most customers will indicate in their Request for Proposals how they want the presentation structured and how it will be evaluated...pay particular attention to these instructions. Before putting pen to paper and building an outline, spend some time reviewing all aspects of these sections so you have a clear understanding of the requirements and rules for the oral presentation. A good review at this point also will help you formulate any absolutely necessary questions for the Government to clear up any confusion.

#2 Build and Stick to an Outline. After reviewing the requirement, build an Excel-based oral presentation outline to the slide level. Include all slides requiring development including any “wrapper” slides needed to round out the presentation (Introduction, Overview, Summary, and Section Breaker slides). After completing the outline, pass it to someone on the proposal team for evaluation against the requirement to confirm interpretation of all requirements. This acts as your first compliance review. Also, pass the outline to the proposal manager for review against the proposal compliance matrix. This outline then forms the basis of all presentation development, status, and production activities. Once your outline is ready to go, you can start to structure the presentation by taking the compliant slide titles from the outline and including them in the presentation.

#3 Think About Your Overall Message Early. In any oral presentation, a team can deliver only a few messages to a customer. My experience tells me that a one-hour oral presentation can have about five key messages in it. A two-hour presentation might have six or seven delivered messages. By the time your RFP has been released, your capture manager will have spent a lot of time formulating a strategy and offer, and will have presented that strategy and offer to management for review and refinement. As you develop your outline, take hold of that capture strategy and offer and fold them into the outline to ensure the offer is well incorporated and evident throughout the oral presentation.

#4 Build Slides Starting with the Message. When building a slide to address a specific requirement in an oral presentation, start with the key, bottom line message. Some call this message the “tag line” or “bumper sticker.” Typically, you’ll place this message on the slide either at the top below the slide title or at the bottom centered on the slide. Once you have this key message, you’ll be able to more accurately construct the slide to address the requirement. Getting your authors to start with this slide-level message will ensure they keep their eye on the strategy and offer throughout development. Do you need to develop proposal storyboards to the slide level to be successful? NO! Some companies build proposal storyboards for their oral presentations to the section level to ensure requirements are traced and understood, messages are included, and development teams are thinking through illustrations and key points, but they are not required to be successful. Follow your company’s proposal best practices when transitioning from outline to slide-level development.
#5 Think Structure First, Then Data. You ask your customers to process a lot of data in real time when they receive your oral presentations. Any customer receiving an oral presentation has to understand the structure of the oral presentation at the presentation, section, and slide level before they can process any data inside it. Think about setting up a common look and feel in your oral presentation sections where it makes sense. The common look and feel, typically used in sections like technical approach, key personnel, etc., will allow the customer to quickly get to the data of the section because they only have to process structure one time. A common look and feel will give your slides a uniform, professional look while dramatically enhancing real-time understanding.

#6 Select Presenters Starting with Qualifications. Very often I’ll join a team developing an oral presentation and my capture manager will say, “We selected Bob because he’s a great presenter.” My first question back at this point always is “How does Bob match the qualifications of the position for which he’s being bid as a key person?” Sometimes I’ll get a blank stare in return. Select your presenters first based on qualifications against any key personnel criteria typically contained in Section H of the RFP. A good coach can develop good presentation technique in a couple of days, but cannot insert 10 years of credible experience into a resume. You’ll see the difference in their credible stories, examples, and experience delivered during the presentation.

#7 Focus Red Team on the Slide Deck. Reviewing oral presentations during the proposal development cycle can be a bit tricky. Focus your proposal color team reviews on the content of the oral presentation volume and not on the presenters delivering the message. Take the time to review the requirement with your reviewers. Then “walk the wall” so your reviewers can see the big picture while delivering to them what I call a “meta-presentation” (a presentation about a presentation that focuses on expected section timing, strategies, messages). Sit the reviewers down to review the slide deck only, so they can improve compliance, content and messaging. Once presentation materials are finished and you’ve been scheduled to deliver your presentation, invite them back for dress rehearsal later to focus on the presenters delivering the message. You’ll get much better feedback and recommendations from both reviews.

#8 Don’t Write a Script! When I engage with teams to rehearse presentations, I spend a lot of time undoing bad recommendations to completely script an oral presentation. Help your presenters develop the key points of the presentation they will deliver. Your presenters can then have a conversation with the customer using the “speaking vocabulary” and not the “writing vocabulary” used when they write scripts. You’ll see presentation timing become more consistent. Your messages will become more evident and easier to understand. Most importantly, your presenters will gain more confidence very quickly.

#9 Help the Evaluators. As I stated earlier, your evaluators process a lot of information in real-time during any oral presentation. Your customers typically evaluate your oral presentations in real-time and complete that evaluation the day you deliver your presentation. Some typical techniques to assist them in evaluating include following the requirement/criteria in exact order (and telling the customer you’re doing that), using “section breaker” slides discussed earlier, using section pointing markers (in a few words) in the slide title or footer area, and occasionally verbally pointing the customer back to a specific paragraph/number in the requirement. Any opportunity you take to assist them in their evaluation will help them evaluate and you score points.

#10 Rehearse at the Right Time. Getting a presentation team to peak at the right time is a coaching challenge. Choose carefully your rehearsal cycle and rehearse just enough (typically five to seven rehearsals) to help your team gain confidence and credibility while helping them manage their energy to the finish line of a successful presentation. Consider the complexity of the presentation as well as the experience of the team and individuals. Rehearse all aspects of the presentation to ensure your team experiences no surprises. During dress rehearsal, invite experienced reviewers who will add value and help build the team’s confidence, while making sure the team can handle tough questions effectively. Done right, rehearsal can mean the difference between winning and losing.

Take the time to review and analyze these ideas and implement them for your upcoming procurement oral presentations. Consider investing in an objective coach to support your presentation development and rehearsal activities and increase your win probability. You’ll see big improvements in your presentation content, messaging, and in the confidence of your presenters.
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