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Pursuit process checklist for Professional Services

A guide for making the most of new client opportunities, reviewing the steps and details over the course of a pursuit, including proposal delivery

Introduction

In professional services professions, the end-to-end sales process is called a pursuit. It often starts with a client conversation, or receipt of an RFP, and goes through to client decision. Relationships in professional services are such a strong factor in awarding new engagements, the activities surrounding a proposal document are critical to the success of the bid.

While selling professional services, a proposal document is key, but it likely cannot win the work. It is often said that the proposal can lose the work, but sustained effort throughout the pursuit is what wins. Factors such as building relationships, chemistry between teams, references, prior work completed for the client, and more will assist the client in making the final decision as to provider. If pricing is wrong, team is wrong, document is error-ridden or unclear or doesn't answer questions asked in an RFP, etc., the firm submitting can be eliminated from the competition.

Pursuit Process Stages and Team

So, what does the pursuit process look like and how can steps in the process better contribute to the proposal document? The process can be of varying length, from days to months, and the relationship can be existing or new. The order of the process outlined below may vary, based primarily on those two factors: length of the pursuit process and the nature or depth of the relationship with the client.

Let's break down the process into stages:

- Pre-proposal – The activities taking place before the proposal document is started
- Proposal – The activities related to the actual writing and delivery of the proposal document
- Post-proposal – Activities taking place after the proposal document is delivered to the client

Note that the team working on a pursuit in professional services usually consists of numerous people, and many will have input on the document as well as the activities before and after the document. This team is referred to as the pursuit team and may include:

- Lead partner – The partner primarily responsible for this opportunity; likely leads both the client service team in the engagement if won, and the pursuit team through the process of pre-, proposal, and post-activities
- Client service team – Additional members of the team who will perform the work on the client engagement if won, and who may also participate in pursuit activities
- Business Development (BD) team members – BD team members participating in the pursuit; may include service or industry BD, client account manager; some professional services organizations have business development directors, who lead the strategy of the pursuit, in other cases, the pitch team member primarily responsible for the document is leading strategy
- Pitch team members – Member or members of the proposal writing team, who may lead the strategy for the pursuit but who will certainly have primary responsibility for the proposal document

Below is a handy checklist for completion of pursuit activities in Professional Services.

For our full guide to Pursuits in Professional Services, please visit this link: https://qd4.us/mpfchecklist

Pre-proposal activities

1. Receipt of RFP/notice of RFP forthcoming/opportunity discussion with client

- ☐ Assemble lead partner, strategy leader, proposal writer, and other key senior team members, including firm leadership in some cases
- ☐ Gather relevant information about the client and competition via client account manager
- ☐ Determine the viability of the opportunity and go/no go

2. Kick-off meeting

- ☐ Gather relevant information:
- ☐ Determine differentiators and strategy; discuss any themes, visuals, etc., that require sign off or input from the team as a whole
- ☐ Agree team and roles in the pursuit process, as well as engagement
- ☐ Assess competition
- ☐ Propose preliminary pricing strategy
- ☐ Determine preliminary assignment of RFP questions to pursuit team members
- ☐ Create a group calendar to track availability for meetings, proposal document review, etc.
- ☐ Map meetings with client stakeholders/confirm team members to attend each

3. Meetings with the client

- ☐ Determine client representatives with whom to meet
- ☐ Schedule team members to attend
- ☐ Outline topics of discussion
- ☐ Develop documents/materials
- ☐ Communicate results/notes of meetings

Proposal activities

1. Develop proposal/response

PROCESS

- ☐ Outline
- ☐ Collaboration
- ☐ Execution

OBJECTIVES

- ☐ Customer centricity
- ☐ Personalization
- ☐ Differentiation

LAYOUT

- ☐ Essential sections

STYLE

- ☐ Language
- ☐ Visuals
- ☐ Length/navigation

2. Deliver proposal

- ☐ Confirm format
- ☐ Confirm mode of delivery
- ☐ Arrange production (if hardcopy)
- ☐ Arrange delivery (if hardcopy)

Post-proposal activities

1. Post-proposal meetings

- ☐ Request feedback on the offering
- ☐ Ask how your firm compares to the competition
- ☐ Ask what more is needed to stand out

2. Oral presentation

- ☐ Develop documents
- ☐ Appoint attendees
- ☐ Script speaking topics and order
- ☐ Rehearse presentation
- ☐ Reflect attire of client

3. Decision and associated marketing/announcement

- ☐ Draft marketing or PR/ announcements needed for either the client or your firm
- ☐ Determine permissions needed to discuss the win publicly
- ☐ Schedule an engagement kickoff meeting to get the project started
- ☐ Thank the entire pursuit team at your firm – celebrate the win!

4. Pursuit review

- ☐ Schedule pursuit review meeting
- ☐ Consider team leader or neutral party to conduct the interview
- ☐ Convey interview results to the pursuit team, practice, and firm