

Persuasion is fundamental to selling. Sellers use written and oral appeals to persuade prospects to accept their ideas, services, and products.

Aristotle defined a rhetorician as *someone who can see what might be persuasive*. Aristotle's rhetorician sounds like the ideal person to prepare and present oral and written proposals. However, Aristotle also said that although rhetoricians know how to be persuasive, they are not able to convince everybody.

Like a rhetorician, few sales and proposal professionals are 100 percent successful. However, applying the principles of rhetoric can make you a more persuasive writer and speaker.

The basis for persuasion is rhetoric, defined as *the art of writing or speaking effectively*. In his treatise, *Rhetoric*, Aristotle stated that persuasive writing and speaking are based on three types of appeals:

1. *Ethos* is appeal based on the reputation and character of the speaker. In written and oral proposals, reputation extends beyond the speaker to the sales team, the speaker's organization, and other sources of information about the seller. In written and oral proposals, the seller should trust the sales team and the organization that the team represents based upon prior events, the behavior of the team at the event, and the team's oral and written messages.
2. *Logos* is appeal based on reason or logic. Scholarly documents are often logos-driven. In written and oral proposals, the seller's message should be reasonable and logical.
3. *Pathos* is appeal based on emotion, specifically, the emotional state of the prospect. Advertisements are often pathos-driven. In written and oral proposals, the seller should acknowledge, and meet or address the prospect's emotional needs.

For simplicity and clarity, the terms *reputation*, *reason*, and *emotion* are used instead of *ethos*, *logos*, and *pathos*.

Persuasion is more ambitious than exposition. Exposition is to simply explain or inform. Persuaders seek a specific response: to have another party accept their ideas or agree to a specific activity, such as buying their service or product.

Business development, proposal preparation, and sales methodologies are replete with lore, a *body of knowledge held by a particular group*. This *Proposal Guide* largely comprises business development lore, but several specific guidelines are directly supported by defensible scientific research. *Guide* guidelines stem from years of practice, trial-and-error, and professional assessments of best practice across hundreds of organizations.

Persuasion is the common denominator found in most selling and business development lore. Sellers who understand the elements of persuasion can more effectively apply the lore of business development and proposal preparation. These sellers are in a better position to assess what will be persuasive in specific written and oral proposals.

Each seller's goal is to persuade a prospect to decide either to purchase the seller's solution or to agree to take the next step in the sales process. Hence, research on how people make decisions is highly relevant. Both contextual and psychological constraints affect buyers' decision making. While decision-making theory is fluid and research is ongoing, some reliable key points are:

- **A human's ability to make a purely logical decision is limited.**

Complex circumstances, limited time, imperfect data, and an inadequate ability to analyze the data form a decision-maker's state of *bounded rationality*.

Persuasion

1. Assess the prospect's vision, motivators, and hot button issues.
2. Determine your next, realistically achievable objective.
3. Collaborate with the prospect throughout the sales process to gain information, develop rapport, validate assumptions, and assess progress.
4. Maintain credibility.
5. Use classic communication techniques to present persuasive selling points.
6. Align your persuasive techniques to the specific needs of individuals in the buying process and their preferred communication styles.

- **Humans knowingly make unreasonable decisions.**
- **Every decision involves reason and emotion.**

Research with brain-damaged patients shows that when logic is cut off from emotion, patients could not make decisions. PET (positron emission tomography) and fMRI (functional magnetic resonance imaging) scans show that all decisions involve a complex interplay between the emotional and logical centers of the human brain.

Individuals in controlled experiments and real life situations will ignore their economic best interest (reason) and make decisions for emotional reasons (anger, revenge, immediate gratification, irrational fear, risk avoiding, or risk seeking). Essentially, the emotional sector of the brain overrides the reasoning sector.

Which type of appeal is most effective? Aristotle said reputation was the most effective appeal, based upon trust in the credibility of the

speaker. Advertisers rely heavily on appeals to the emotions of the prospect, but use credible speakers to deliver the message. Most sellers make “reasonable” arguments, even though their arguments might not withstand the scrutiny of the prospect or a logician.

Reputation, reason, and emotion are all essential persuasive elements in crafting complex sales arguments. Like a three-legged stool that is unstable with a single leg removed, you are far less likely to make the sale if you omit any element.

All techniques recommended in this *Proposal Guide* are rhetorical devices originating in Aristotle’s three types of appeals. The guidelines in this section integrate the research on what is persuasive with the lore of selling and proposals. Fortunately, if you are an experienced proposal writer you have probably been using many of these techniques. Ideally, you will become a rhetorician skilled at blending reputation, reason, and emotion in an integrated appeal that might be more persuasive.

1

Assess the prospect’s vision, motivators, and hot button issues.

Most motivators are directly linked to reason. However, the individuals’ identifying motivators are often influenced by their personal emotional needs.

Similarly, organizational motivators drive organizations; personal motivators drive individuals who make or influence purchasing decisions.

See **Features, Advantages, and Benefits and Strategy.**

Start with the premise that people seek benefits based on two factors:

- *Perception*: whether it is good or bad
- *Possession*: whether we have it or not

Buyers seek one of four types of benefits derived from perception or possession as illustrated in figure 1, and sellers promise benefits in exchange for money or power. Sellers must link their solution to the prospect’s needs.

Effective sellers begin by analyzing prospect needs, and by determining their organizational *vision, motivators, and hot button issues.*

Vision refers to the prospect’s organizational image of what the future will or could be like. Sellers that clearly demonstrate how their solutions will help prospects achieve their vision usually win the sale. Note how this vision statement powerfully appeals to reason and emotion:

Imagine: doctors operating on a patient can point a RxT laser at live tissue, analyze the reflected light with a spectroscope and PC, and immediately determine if the tissue is malignant or benign. Further imagine that this scenario can be made real within 16 months if you fund our program.

Issues are the prospect’s concerns—the worry items that keep the prospect’s managers awake at night. To address issues effectively, determine the

source. Is this an issue because the prospect does not trust you or your organization, because the prospect cannot see a logical reason to purchase or cannot see how to justify the purchase, or because the prospect has an emotional need?

The prospect’s issues typically become motivators:

- Improve profits
- Increase sales
- Reduce costs
- Improve safety
- Reduce risk
- Improve quality
- Increase productivity

All motivators are issues, but not all issues are motivators. In complex sales, most motivators usually stem from reason and are logical.

Hot button issues are a consolidated subset of issues and motivators. Typical hot button issues are owned and repeatedly cited by several people in the prospect organization. Since hot button issues often relate to reputation, reason, and emotion, address them by incorporating all three types of appeals.

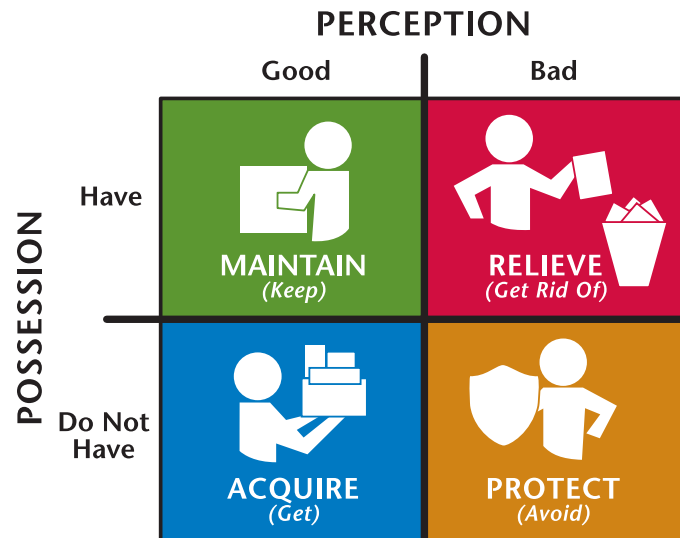


Figure 1. Buyers Seek Four-Types of Benefits. Buyers' motivations rely on their perceptions of good, bad, and possession. The four possible combinations are: 1) **Maintain:** Keep the good; 2) **Acquire:** Get the good; 3) **Relieve:** Get rid of the bad; 4) **Protect:** Avoid the bad.

2

Define your next, realistically achievable objective.

See Sales Letters.

Prospects become customers via a consistent, cyclical process:

- *Operating* in their normal environment. In normal environments, things age, wear, and decay; prospects needs evolve.
- *Assessing need.* Prospects perceive a need or opportunity to improve and then determine if they really have a problem/opportunity.
- *Valuing solutions.* Determining which, if any, solution offers the best value.
- *Resolving remaining issues* with the solution that offers the best value.
- *Purchasing.*
- *Implementing the solution.*
- *Operating* in their normal environment.

Persuasion can be applied at every phase.

To advance the sale, determine where prospects are in the process. Find answers to their questions, and then state your next, realistically achievable objective. *Exactly what would you like this prospect to agree to do next?*

Before attempting to persuade prospects to take action, test your readiness by asking three things:

1. Where are they going? (*Vision, objective, or goal*)
2. What is their next realistically achievable step towards that goal? (*Advance complex sales in a series of steps.*)
3. Why is it in their best interest to agree to take the next step? (*Motivators, hot button issues*)

Advance at the prospect's pace; pushing the pace in a complex sale alienates the prospect. Perhaps the only tactic sellers can effectively use to increase the pace is to note the opportunity cost as the prospect delays implementing improvements.

Determine what credible combination of reason and emotion will address prospects' underlying issues. If you misjudge prospects' issues at this point in their purchase-decision process or cannot adequately answer their questions, you risk not advancing, delaying the purchase, or losing the sale.

Examples of not seeking to advance the sale and advancing too fast:

Not seeking to advance the sale

Thank you for agreeing to meet with me today. Should you have any questions in the future, please do not hesitate to call.

Advancing too fast

Thank you for agreeing to meet with me today. We offer the best environmental remediation services available in North America. Can I have your purchase order today so that we can reserve a place in our June work schedule?

State sales objectives clearly so they will be easy to assess. If sales objectives are vague, no one can tell when or if they are met.

Examples of next, realistically achievable objectives:

- Agree to tour a site where your system is operating, preferably Wednesday, December 4, at 10 AM.
- Agree to collect and share their engine design specifications and productions costs, sending them to U.S. via courier by 4 PM, September 30.

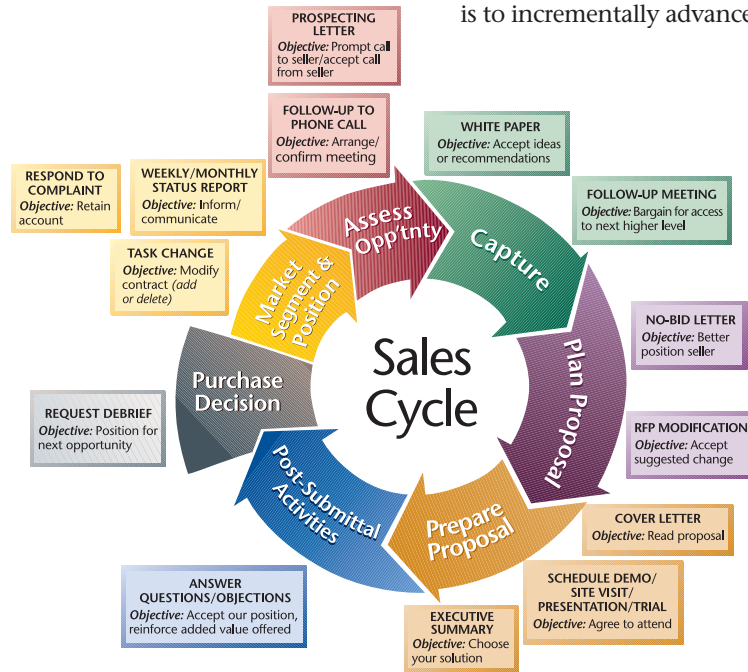
- Agree to meet Thursday, 8 AM, to review and approve final drawings and specifications.
- Agree to consider a change order, adding construction management services to our ongoing design contract.

Vague sales objective

I plan to meet with the prospect to better understand their future needs.

This objective leaves many details unattended. When is the meeting? How many meetings will it take and who will attend? What understanding is sufficient? Where is this going?

The generic sales cycle illustrated in figure 2 illustrates sales phases (linked arrows) and tactical steps (boxes) a seller might take to advance a sale. Whether a meeting, phone call, or document, the objective for each tactical step is to incrementally advance the sale.



This visual representation of the sales cycle follows the same business development process defined in **Process**, rules 2 and 3.

Figure 2. Sales Cycle, Tactical Steps, and Sales Objectives. Each tactical step has a specific, measurable, realistically achievable, sales objective.

3

Collaborate with the prospect throughout the sales process to gain information, develop rapport, validate assumptions, and assess progress.

See **Strategy**.

Collaboration is persuasive because it integrates appeals based on reason, emotion, and reputation. While most collaborative discussions are based on reason, both parties disclose emotional needs. Prospects willingly share information in a collaborative situation. Collaboration builds trust and credibility; ongoing collaboration nurtures this emotional bond. Ultimately, prospects prefer purchasing from people they like.

what they want at the onset. As the sale advances, prospects' implicit needs become explicit, and sellers can directly address these explicit needs.

Needs, issues, facts, and assumptions evolve. Collaborative sellers repeatedly validate assumptions (reason and emotional needs) while building their reputation.

Complex sales involve buying and selling teams, extended buying cycles, and multiple meetings. In complex sales, few prospects know exactly

Use your collaborative relationship to validate your solution before finalizing your proposal. Solutions that have been validated by the prospect win more frequently.

4

Maintain credibility.

Sales professionals are rightfully adamant about maintaining their personal credibility with prospects. The sales professional's credibility extends to the sales team, the seller's organization, and other sources of information about the seller. Maintain credibility by adhering to established ethical standards, introducing appropriate authority figures, substantiating claims, and staying on message.

Prospects must trust what you say and recommend. In addition, many prospect organizations have mandatory ethical standards. For example, the U.S. Government requires sellers from publicly traded organizations to maintain ethical standards established in the Sarbanes-Oxley Act, requiring audited compliance to compete for U.S. Federal contracts.

Prospects readily accept negative seller admissions as truth. Use this to your advantage by admitting a weakness that you can mitigate. Your subsequent assertions will be more credible.

See **Oral Proposals and Presentations to Prospects**.

Prospects are most likely to believe anything negative the seller says about his/her product or service. Therefore, admitting and addressing a weakness usually increases your credibility.

Sellers present themselves as either authority figures or friends. Authority figures are experts, endorsers, users, developers, managers, or owners of the product or service. Friends are people the prospect likes, identifies with, or wants to emulate. Sales professionals usually present themselves as friends, and then introduce authority figures to answer questions, discuss solution details, and substantiate claims.

When introducing authority figures to substantiate your claims, consider their credibility with the prospect and what this prospect knows or believes they know about your organization. Prospects rate the credibility of sources in this order:

1. What they know/believe
2. What similar, trusted customers say
3. What independent sources say
4. What you say
5. What competitors say

Improve your credibility and persuasiveness by increasing the percentage of substantiation from the first three sources. Too many sellers rely on the fourth-level source, themselves.

Messages from all sources must be aligned throughout the sales cycle. Political campaign strategists repeatedly counsel, *stay on message*. Misaligned,

inconsistent messages reduce credibility. Once lost, credibility is difficult to regain.

If prospects doubt your credibility, they assess the non-verbal conversation elements, as summarized in figure 3. Skeptical prospects focus on how you talk and what you do, noticing your body language and actions or behaviors.

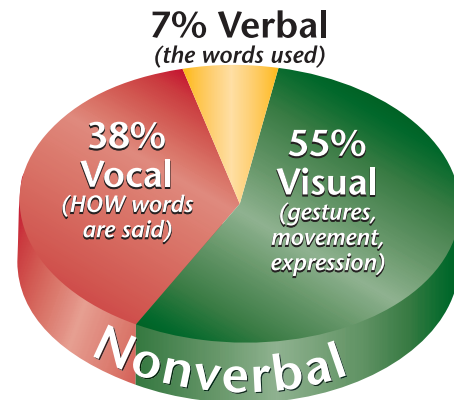


Figure 3. Importance of Nonverbal Communication. Research by Dr. Albert Mehrabian at UCLA demonstrated that as much as 93 percent of the emotional content of a message is conveyed by visual and vocal cues.

5

Use classic communication techniques to present persuasive selling points.

Repetition integrates credibility, reason, and emotion. Trusted sellers keep their word and present a logical, consistent message. Treating buyers consistently satisfies their emotional needs for improved efficiency and reduced stress.

Use consistent terminology. Using synonyms to make your proposal more varied and interesting usually confuses your prospect.

Persuasive sellers communicate their key selling points using these key techniques:

- Repetition
- Association
- Composition
- Selection
- Redirection
- Ghosting

Repetition is an easy, simple, and efficient persuasive technique. The more times we consistently see, hear, and experience something, the more we remember it. Repeated statements, experiences, and actions prompt us to identify with the statement or action unless we have already accepted a conflicting position.

Humans embrace repeated behaviors (habits) because they meet a near-universal emotional need for reduced stress and improved efficiency. A decision that is repeated is really a decision that does not need to be made. Repetitive decisions save time and reduce stress. Note how people tend to sit in the same seat in a classroom, select the same item at a restaurant, and buy the same product. Once a decision about an item or circumstance is made, it is easier to repeat it than risk a new decision.

Here are some of the ways we use repetition in business development:

- Make similar statements throughout the sales cycle.
- Make identical statements in sales presentations and the subsequent proposal.
- Summarize at all levels of a proposal.
- Echo common themes in each proposal volume.
- Carry similar statements through headings, theme statements, action captions, and body text.
- Repeat key body text in margin callouts.
- Repeat introductions in subsequent subheadings.

In a presentation or proposal, restate points from a subtly different perspective.

Your prospect is interested in a low cost solution. You repeatedly emphasize how cost influenced your solution design.

Technical section: *To minimize the cost, we selected commercial off-the-shelf components whenever available.*

Management section: *Our relatively flat organization and increased span of control per key position is specifically designed to reduce overhead burden.*

Task management section: *A team leader, who is a working member of the team, manages each task order. To minimize management cost, we only appoint full time project managers when teams exceed 12 people.*

Deliberate, word-for-word repetition can be reassuring or insulting depending upon how it is done. The following example is reassuring:

You must answer identical questions repeated in two places in the bid request. Answer the question fully the first time it is asked. When the question is repeated, state whether you have repeated or cross-referenced your answer:

Repeat

This question was also asked in Section 3.2. We have repeated our answer here for your convenience.

Cross reference

This question was also asked in Section 3.2. We have summarized our answer here. For the full answer, please turn to Section 3.2.

Association, the second persuasive technique, is linking your strengths to something positive that prospects already like or want, or to something negative that prospects want to eliminate or avoid. Successful association relies upon prior guidelines 1 and 3. Assess what prospects desire or want to avoid, and reassess through collaboration with the prospect.

Association is primarily an emotion- and reason-based appeal. Similar, positive associations are comforting and supportive. Knowing that others have achieved similar positive outcomes is also logically appealing.

Associations are direct or indirect. Direct associations link prospect requirements to outcomes in theme statements, informative headings, section summaries, tables, body text, slides, and assertions in presentations. Most of these associations directly and explicitly link prospect issues and requirements to features of your solution.

Association fails when prospects fail to see the link. These prospects are thinking: *Sounds good, but I do not see why I need the other approaches. Or, Sounds pretty much like all the other approaches.*

Indirect associations are subtle suggestions tailored for a specific prospect. Sellers use pictures, graphics, metaphoric language, allusions, backgrounds, and contexts, as illustrated in figure 4.

Word choice also has a subtle, persuasive impact. Choose words and phrases familiar to the prospect.

Selling IT services to an engineer

I've analyzed your IT systems and think you should consider re-engineering your network. My calculations show that delays have increased 23.6 percent. After you review my calculations, I'm sure you'll agree.

Selling IT services to a banker

I've analyzed your IT systems and think that we can make your network as secure as your vault. I've estimated the revenue enhancements and cost savings, noting that the complete change is revenue-neutral within 2 years.

Selling IT services to an architect

I've analyzed your IT systems and see some need to change the structure of your network. I've sketched a few ideas that will give you a better foundation to sharpen your firm's network design. As you review the blueprint, . . .

The seller mirrors language that prospects use routinely in their work. Subtle but effective.

Composition, the third persuasive technique, is the manner in which parts of speech and writing are combined to form the message. Composition includes the following elements:

- Verbal (the choice of words)
- Nonverbal
- Visual elements (color, shape, and size)
- Aural elements (music, sounds)
- Mathematics (quantities, relationships)
- Time
- Space
- Smell

Composition incorporates appeals based upon reputation, reason, and emotion. For example, consider your home-shopping experiences. Did you consider reputation of the community, neighborhood, realtor, builder, and owner? Did you reason why a certain home was a better value than the alternatives? Did a home or apartment have curb appeal, feel good, smell good (or bad), and evoke strong memories and emotions? These are all examples of being influenced by elements of composition.

Sellers routinely apply elements of composition to oral and written proposals. In many competitions, your first priority is to gain the evaluators' attention and retain it long enough to convince them you offer the best solution. Consider these varied examples illustrating how various elements of composition have been used in proposals:

- Sellers commonly use words, terms, phrases, and acronyms that their prospects use.
- In oral proposals, sellers rehearse extensively to prevent nonverbal elements from conflicting with verbal elements.
- In a competition to sell telecommunications services to Pet Smart®, one competitor created a strong, positive stir by submitting their proposal in the prospect's branded pet carrier emblazoned with "Caution! Live proposal. Handle with care."
- In a UK competition, one bidder increased the graphical content of their executive summary to nearly 80 percent because the decision maker was dyslexic.

Composition incorporates emotion-, reason-, and reputation-based appeals. Emotion is often the most powerful element.

See **Acronyms, Active and Passive, Clichés, Customer Focus, False Subjects, Gobbledygook, Jargon, Organization, Page and Document Design, Redundant Words, and Style and Tone.**

- Sellers are increasingly using audio and video components in sales presentations and embedding links in sales documents to similar on-line presentations.
- Many sellers prepare quantified value propositions, and most proposals attempt to quantify the value of their solution versus the existing approach or alternative solutions. Many proposals describe the results from trade studies.
- Both time and space are important elements in sales presentations. Persuasive sellers consider length, timing, transitions, room structure, visual aids, and positioning of sellers versus the prospects as a few examples.
- While “scratch and sniff” proposals might not have been used in business, publishers insert perfume cards magazines and catalogs, and new car scent is sold in aerosol cans.

Many of the sections in this *Proposal Guide* relate to elements of composition. Figure 5 links some of these *Proposal Guide* topics and summarizes one or two key points.

Sellers instinctively downplay their weaknesses, and potentially mitigate competitors’ strengths, through selection, redirection, and ghosting. Clear, persuasive communicators always place the most important points to the prospect first in a document or presentation. Position infers importance.

Selection, the fourth persuasive technique, is forced on us by the linear nature of communication. Selection forces two decisions on a seller:

- Whether to include or omit a point
- Where to position or order a point

Prospects often limit the time that they will spend with sellers, the page length of proposals, and the time for sales and oral proposal presentations. In the limited time and space available, what will you say? Your decision to say one thing forces you to omit saying something else or saying it later. Hence, all communication is limited, and arguably slanted, or biased to include or exclude items.

TYPE OF INDIRECT ASSOCIATION	EXAMPLE(S)
Metaphoric language	To enable pilots to perform at their best throughout long, grueling missions, our ergonomically designed, adaptable seats can be pilot-tuned to simulate their favorite lounge.
Allusion	While no one can promise zero risk, your retirement nest egg is invested in U.S. Treasury notes that are as secure as
Background	Throughout 6 weeks of collaborative exchanges, your senior managers have emphasized that the ideal solution must be 100-percent compatible with the Easy-Link™ software that we installed in 2002. Easy Link II™ is backwards
Context	With the end of the Cold War and increasing threats from rogue states, the Royal Navy is increasingly concerned about protecting the fleet in brown water. Nearly 80 percent of our I.R.&D. investment since 2000 has focused on countering this threat.

Figure 4. Using Indirect Associations to Persuade. *Subtly persuade prospects by indirectly associating features of your solution to the benefits sought by the prospect.*

TOPIC	USE IN PROPOSALS
Active vs. Passive Verbs	Passive verbs obscure actor; suggests lack of ownership or responsibility for the result. Correct choice depends on your strategy.
Abbreviations	Acceptable when known; confusing and potentially arrogant when unknown.
Clichés	Noticeable use suggests lack of thought and perhaps outdated knowledge.
Choosing Correct Words	Incorrect choice suggests broader incompetence, poor quality.
Customer Focus	Naming prospects before sellers, placing benefits before features, naming prospects more often than sellers, etc., increases customer focus. Suggests seller understands prospect’s needs.
False Subjects	Less clear, forces busy prospects to reread, obscures key points.
Gobbledygook	Obscures meaning; suggests seller is difficult to work with.
Jargon	Must balance between suggesting seller is knowledgeable (insider) vs. arrogant and difficult to understand; impact is prospect dependant.
Organization	Organize according to readers’ interests, summarize at all levels, announce and follow your organization. Suggests seller is competent, clear, deliberate, and thoughtful.
Redundant Words	Acceptable for occasional emphasis, otherwise, cumbersome. Overuse suggests seller is vain, braggart, inefficient, or exaggerating.
Style and Tone	Style choices are a subset of composition; tone is the impact on the prospect, whether or not it is persuasive.

Figure 5. Composition Is a Key Persuasive Element. *Successful, persuasive oral and written communication reflects excellent composition and the recommendations in this Proposal Guide.*

Your reputation is destroyed when prospects discover a deliberate omission.

Unethical sellers that deliberately use omission tactics generally follow a four-step pattern:

1. Omit the information
2. Deny if discovered, saying:

There is nothing wrong with it. (Deny it is bad.)

We did not cause this. (Deny responsibility.)

We did not mean it. (Deny intent.)

3. Minimize the harm, saying: *It won't matter . . . only a few people were involved . . . that seldom happens . . . it could have been much worse.*
4. Divert attention, saying: *You were extremely lucky that xxx didn't happen . . . this gives us the opportunity to . . . I was more concerned about . . . Did you hear what happened to . . .*

Most decisions to include or omit information are not harmful or deceptive. For example, the late development of a new product would probably not affect your ability to support an unrelated, existing product. Your recent decision to hire 15 software engineers to develop a new application would probably not affect your ability to deliver outsourcing services.

Selection can involve ethical considerations. Unethical selection can be a deliberate, calculated, strategy of silence, usually to downplay weaknesses. Unethical sellers deliberately conceal by selection, but the separation between ethical and unethical is narrow.

Consider the difference between proof and support for sales assertions:

This prospect is concerned about completing the project on schedule. You must promise to complete it on time as a bid requirement. A proof statement, assuming a similar probability of on-time completion, would be:

We completed 8 of 10 similar distribution centers on time, as listed in figure 1.

A support statement, offering evidence that on-time completion is possible, would be:

Global Computers needed to complete a similar distribution center in the same, 6-month period. After a brief oral proposal process, they selected Shipley Constructors. We completed the distribution center 2 weeks ahead of schedule and were cited as Global's Star Vendor for 20XX.

Would this statement be unethical if the Global distribution center was the only project Shipley Constructors completed on time?

Taking quotes out of context is a form of selection. At what point is a quote about your organization's excellent performance no longer relevant? Is it relevant 6 weeks, 6 months, or 6 years after the customer said it? If that same customer is now displeased with your organization due to another event, is the original quote still true because it was true when they said it? Must you disclose the unconnected event? How would your immediate prospect react if they contacted this reference?

Half-truths are statements that deliberately omit facts or information necessary for a full description or account. Half-truths are unethical and might be illegal, depending largely on the speaker's intent. For example, many statements in ads are true, but incomplete. Are these ads unethical if the omission is deliberate?

To limit deliberate half-truths and lies, governments enact disclosure laws, requiring sellers to disclose certain information, or certify that they comply with other legal requirements. For example, the U.S. Government requires sellers to disclose full cost and pricing data and reserves the right to subsequently adjust payments if

insufficient data was disclosed. Deliberate omission of relevant cost and pricing data is fraud, a criminal offense.

Here are some questions to ask to help you determine if a selection decision is unethical:

- What are the potential consequences of the omission?
- Would discovery reflect unfavorably on how prospects view you or your organization?
- Would discovery affect their decision on this purchase?
- Would publishing this omission in the newspaper embarrass you or your organization?

The order of presentation is an important selection element of persuasion. Readers predominantly associate order with importance. The first item presented is most important, and following items are presented in decreasing order of importance. If you intentionally adopt a different convention, explain your decision to avoid misleading the prospect.

Key proposal guidelines relating to order are summarized below:

- Order points in decreasing order of importance from this prospect's perspective. For example, cite benefits before features.
- When items are of equal importance, say so.
- Announce your order, and then stick with it unless redirected by the prospect.
- When reusing material, reorder your points for this prospect. Omit non-relevant points.
- When compelled to discuss bad news, open with a positive point.
- Begin presentations with an attention-getting statement you can support in your presentation.
- In presentations, consider using your most powerful point for a memorable close if you are sure the audience will be present and attentive throughout.

Redirection, the fifth persuasive technique, is the tactic of shifting attention to other points. Prospects usually want a range of features. A common ethical redirection is to counter a weakness in one area with an offsetting strength in another area.

For example, a customer requested a search and rescue helicopter that could meet the following requirements:

- 250 mile search range
- 2 hour loiter time over the search area
- Winch 15 survivors from the water
- Maintain 1 hour reserve fuel capacity

The positive response follows:

Our aircraft can maintain all required search parameters and successfully winch 8 survivors from the water. However, if the search range is reduced from 250 to 225 miles, we can maintain all other search parameters AND successfully winch 15 survivors from the water.

Another common and ethical redirection is to offset a performance shortfall (weakness) with lower cost (strength), or vice versa. Here is an example in proposal text:

See **Strategy**.

Our firm, fixed-price construction cost is \$10,000 greater than the target cost in your bid request. However, our fast-track construction approach enables you to move-in 2 months ahead of schedule, saving \$10,000 in rent at \$5000 per month.

Humor and collaboration can be ethical redirection tactics. We all use humor to defuse tense situations, relax people, and build rapport. Skilled sellers occasionally use humor in sales presentations, once they have established an acceptable relationship. Upon entering potentially contentious negotiations, a seller stated: *Don't you just hate this part?*, thus defusing some of the tension and perhaps personal animosity.

Collaboratively involving prospects in determining the solution to a problem diverts attention from: *What is wrong?*, to: *What do we agree will make it right?* Customer service representatives are routinely taught to use questions like *What would you like me to do to fix this problem?* They are using collaboration to redirect the customer from unproductive venting to productive problem solving.

Sellers routinely redirect prospects' focus from price to value by collaboratively developing a quantified value proposition. Once prospects quantify the added value of the improved solution and the opportunity cost of delays, the outright price or price differential versus the alternatives becomes less important.

Unethical redirection tactics usually intensify unrelated or trivial side issues. Traditional names for these redirection tactics are *bait-and-switch*, *hairsplitting*, *red herring*, *busy work*, *legal harassment*, *loophole*, and *cosmetic difference*. Attacking the messenger is a second unethical redirection tactic, where the credibility of the messenger is questioned.

A third redirection tactic is to rename the

problem. *Taxes become revenue enhancers; deficits become revenue shortfalls, power failure becomes current interruption, problems become challenges, and change orders become opportunities for further enhancements.* The term *spin* is a redirection tactic, where the speaker or writer attempts to create a favorable (or unfavorable) impression. Exactly when ethical spin becomes unethical is a difficult judgment that rests on the user's intent and the impact on the prospect.

Ghosting, the sixth persuasive technique, is calling attention to unnamed competitors' weaknesses by highlighting the importance of, or differences between, alternative approaches or solutions. Whether emphasizing your strengths or highlighting competitors' weaknesses, the following ghosting tactic is the same:

Emphasizing a seller's strength (excellent safety record)

With our lost-time-accident rate less than one-half the Montana state average, construction can continue on schedule.

Highlighting a competitor's weakness (poor safety record)

Our safety record is better than any other Montana contractor. With our lost-time-accident rate less than one-half the second-place contractor, construction can continue on schedule.

Ghosting and trade-off analysis are similar. Trade-off analysis is simply discussing your analysis of alternative approaches, and then noting why one alternative was selected and the others were rejected. The most sophisticated trade-off analyses bound the alternatives, noting the conditions where the preferred alternative changes. When one of the rejected alternatives is the same as a competitor's approach, you have ghosted or cast doubt on that competitor's approach.

The following example illustrates how ghosting was used ethically to win a recompete:

The incumbent operator of a medical laboratory for a large, government agency was seeking a third, 5-year contract. Competitors' complaints about favoritism towards the incumbent prompted the contracting officer to limit proposals to 100 pages to neutralize the incumbent's advantage. The incumbent's strategy was to convince the customer that managing this complex laboratory was too risky to shift to a new operator. Their tactical approach was to use detailed graphics to depict all processes. Such detailed information caused the customer to see the risk of allowing a new vendor to take over its complex operations. The incumbent retained the contract.

6

Align your persuasive techniques to the specific needs of individuals in the buying process and their preferred communication styles.

Complex buying decisions are made by buying committees. The individuals on buying committees assume the five, classic decision-making roles as described in figure 6. Individuals in each role have typical needs or issues in their decision-making role, also listed in figure 6.

Sellers that are aligned with their prospects are meeting the individual business and emotional needs of each person on the buying committee. Not only do sellers supply prospects with the business information that they need when they need it, but sellers also recognize and address prospects' emotional needs. Staying aligned becomes more challenging when you consider

that the needs of individuals on the buying committee change over the buying cycle.

Individuals have different preferences in how they take in information. Educators classify learning styles as visual, auditory, and tactile/kinesthetic.

Visual learners learn through seeing. Visual learners need to see the teacher’s body language and facial expression. They often think in pictures, learn best from visuals, and take detailed notes to absorb the information.

Auditory learners learn through listening. They prefer lectures, discussions, talking things through, and listening to what others have to say. Auditory learners interpret the nuances of nonverbal speech, such as tone, pitch, and speed. Written information is less accessible until it is heard.

Tactile/kinesthetic learners, a much smaller segment, learn by moving, doing and touching. They are hands-on people. They often find it hard to sit still for long periods and may become distracted by their need for activity and exploration.

Most adults develop the ability to take in visual, auditory, and tactile/kinesthetic information, but we retain preferences. We all can cite

colleagues who tend to be visual, verbal, or tactile/kinesthetic. While well beyond the purpose of this *Guide*, sellers that adapt their style of communication to meet the needs of specific prospects will be more persuasive. Most sellers sense when they “click” with prospects but might not recognize why they clicked.

While useful to recognize prospects’ preferred communication style, the usefulness and reliability of adapting your communication style is limited in complex sales. For example:

- Few sellers can accurately and reliably “read” a prospect’s preferred communication style. Most adults have learned instinctive adaptations, but have difficulty consciously adapting their communication styles.
- Most sales presentations and documents are prepared for a buying committee. Even when documents are prepared for one individual, these documents might be forwarded to others in the buying organization for comment or approval.

Hence, follow the persuasive communications guidelines suggested throughout this *Guide*. Integrate **visual**, **verbal**, and **tactile/kinesthetic** elements in reasonable, credible, and emotion-based appeals.

ROLE	DESCRIPTION OF ROLE	COMMON NEEDS
Recommender	Gathers data, prepares specifications and bid request, manages the evaluation process, prepares oral/written recommendation. Builds buy-in towards a consensus decision. U.S. Federal example: Source Selection Evaluation Board Chair or end user.	Enough data but not too much; quantitative justification for what might be an emotional decision; timely responses to meet procurement deadlines.
Approver	Has power to veto the recommendation, whether formal or informal. Veto can prompt a modification of the request or escalation to the “Decider.” Often technical, legal, contracts, finance, or a consultant. Could be approver due to personal relationship with decider or user. U.S. Federal example: Contracting Officer (CO), CO Technical Representative (COTR), or other purchasing official.	Enough data to satisfy “technical” information needs. Credible reputation with fellow specialists. Bidder must demonstrate understanding of the specialists’ disciplines and meet specialist requirements and regulations
Influencer	Asked for their opinion because they are involved in implementation. Strong influence but no veto power. U.S. Federal example: CO Technical Representative (COTR), or Small/Minority/Disadvantaged business representative.	Bidder must acknowledge importance of this person’s role and opinion. Spurned influencers may work to undermine offending sellers.
Decider	Final authority; accountable for the decision; power to commit organization. Some organizations require a consensus. U.S. Federal example: Source Selection Authority.	Solution must be compatible with organizational vision, decision rules, direction, and other initiatives. Evidence of commitment and risk sharing. Acceptable, manageable risk. Accessible, responsible counterpart identified in selling organization.
Implementer	Implements, executes, uses, or operates solution. Could also be the recommender.	Requires past-performance data. Reviews reputation of seller with colleagues; specific measurable milestones; transition plan; training plan; credibility, reputation, and experience of key individuals committed by seller.

Figure 6. Buying-Decision Roles. *When determining what might be persuasive to individuals on the buying committee, consider their roles in the buying decision. Each role might include multiple individuals and some individuals might have multiple roles.*