



Consultative Capture

*Why some capture managers
succeed while others fail.*

Facilitated by:



Mallary Price
Marketing & Training
Coordinator



Eric Gregory
Business Winning
Executive Consultant



Amy McGeady
SVP
Strategic Services



Brad Douglas
EVP
Shibley

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Clients and industries served



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Webinar Agenda



- Common capture challenges
- Consultative capture competencies
- Approaches to consultative capture
 - Leadership and trust
 - Customer engagement
 - Active listening
 - Credibility
- Q & A and summary

Source: Over 50 experienced capture practitioners from various industries



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Why This Topic

There are common challenges with the capture / buyer relationship

Lack of trust	Bad experience(s)	No relationship
Confusion in the market	Poorly communicated expectations	Regulation and politics
"High pressure" tactics	Seller is unresponsive to requests	Seller is a "know it all"



"It takes 20 years to build a reputation and five minutes to ruin it."

— Warren Buffett

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Capture Managers Must Balance the Tactical with the Interpersonal



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Consultative Capture Competencies

- Relationship Building** Internal and customer relationships drive capture success.
- Leadership** Too many *capture managers* manage. They don't lead.
- Customer Engagement** Often, *capture managers* fail here. They rely too much on technical or program knowledge.
- Win Strategy Execution** Great ideas and no action equals a loss. You must accomplish important actions.
- Trust** You can't be a great capture manager if you don't establish **trust** – internally and with your customer stakeholders.

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Consultative Capture *Leadership Qualities*

Create Vision—
Collaborate with stakeholders to shape a mutually beneficial vision.

Develop Strategy—
Focus on customer issues and benefits.

Impel Action—
Engage, brainstorm, co-create solutions, internally and with customer.

Set Expectations—Be accountable to each other and succeed or fail together.

Advance—Always move forward and overcome all obstacles to success.

Inspire—We can. We will. We won. Veni, Vidi, Vici (I came, I saw, I conquered.)

Communicate—Every day. Team. Externally. Individually. Frequently. Effectively.

Reward—Create fun, excitement, praise, acknowledge, promote.

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Consultative Capture Starts with Trust



"You may not be able to control everything, but you can influence certain things. Trust starts with you."

—STEPHEN M. R. COVEY

Author: The Speed of Trust

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Consultative Capture Is Built on Trust



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Consultative Capture Improves Efficiency and Results



Enhance **thinking** of team and collaboration with the customer

Impose **discipline** in pursuit management

Build **consensus** internally and with teaming partners

Transfer information from sales to pursuit and proposal teams

Identify gaps in win strategy and capabilities

Save money and reduce wasted resources

Become a trusted advisor to the customer and your team



"He who does not trust enough will not be trusted."

— Lao Tzu

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The New Discriminator

How we engage with the customer establishes trust.

HOW

VS.

WHAT

We should advance our position based on **how** we sell—
not just the **what** you sell.

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Consultative Capture Uncovers Hot Buttons



*Customer issues include more than just
product or service requirements.*

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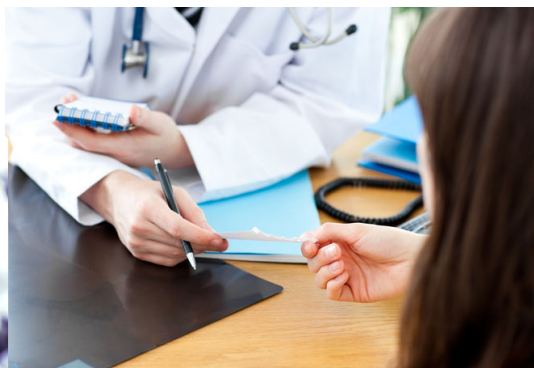
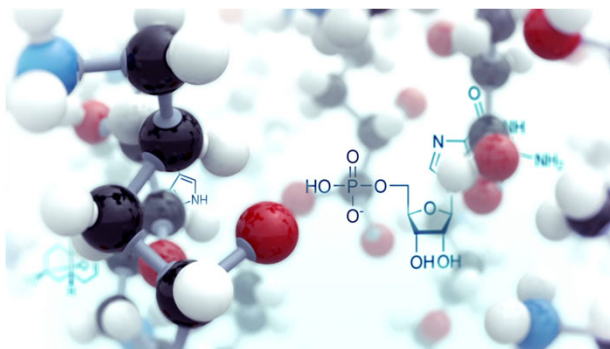
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Be Consultative by Diagnosing before Prescribing

- Identify the real problem
- Avoid discussing unnecessary, premature, or ineffective solutions
- Consider multiple perspectives
- Anticipate potential risks and challenges



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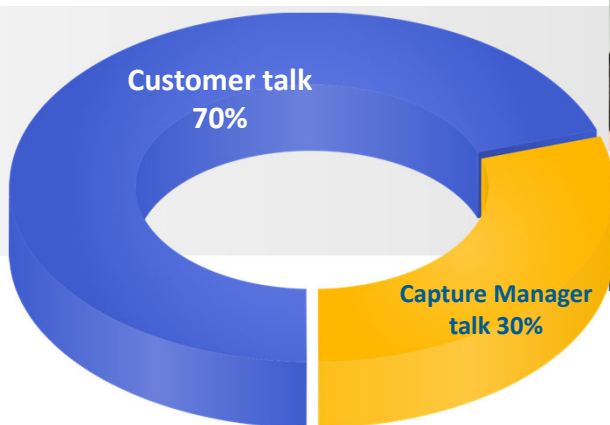
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Ask Effective Questions

To be more consultative, listen more than you talk.



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Engage with Clarifying Questions

Validate acquisition strategies and objectives.



What's driving this acquisition within your organization?

Who/what is impacted by this program?

What is the timeline for this acquisition?

How does this affect other organizations?

Who are key stakeholders?

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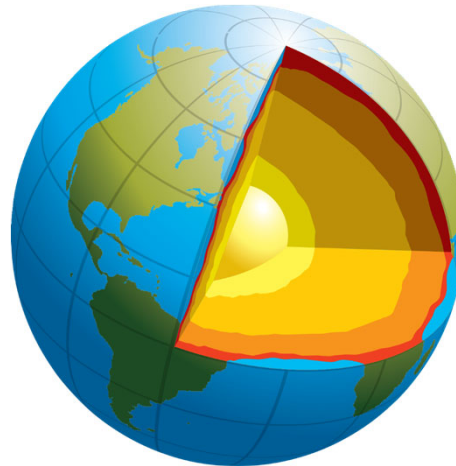
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Keep Drilling Down for Understanding

Ask, ask, ask to validate your awareness.



- What is the potential?
- Where are we in the acquisition process?
- Can we provide a viable solution?
- Who is likely competing?
- Who are the stakeholders?
- Why would the customer award us?
- What is the budget? Is there a budget?
- How will it be funded?
- What is the schedule?
- Where will it take us?
- **No Guessing!**



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Asking Discovery Questions

FACTUAL Qs

Questions that explore the facts needed to understand the customer's situation needs: *"Who exactly is involved in deciding on a (your solution)?"*

INPUT Qs

Questions that explore what the customer thinks; their ideas opinions and perceptions: *"What do you think about...?"*

NEED Qs

Questions that explore what the customer does and doesn't want to and need: *"Can you tell me what you are looking for in....?"*

DIRECTIONAL Qs

Questions that explore what the customer would consider as next steps and options: *"What are your options and next steps?"*

SATISFACTION Qs

Questions that explore how the customer feels about their current products, as well as yours: *"Do you like...(your current provider)?"*

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Additional Discovery Questions

CONCERNS/ OPPORTUNITY Qs

Questions that explore either opportunities or roadblocks: *"Are you interested in...?" "What concerns do you have with...?"*

UNDERSTANDING Qs

Questions that explore the extent that you understand what the customer is saying and wanting: *"So, what will be Ms. XYZ role in evaluating options?"*

EXPECTATION Qs

Questions that explore the customer's readiness to move forward in the acquisition process: *"When do you (or your organization) expect to put forward a solicitation?" or "When do you expect an RFI to be released?"*



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Consultative Capture Means *Active Listening*

Pay attention to the “what, the how, and the why” of the message.

Interpret or clarify the intent.

Repeat what you heard or noticed in the response.



Narrow down the message into key **hot button** issues.

Ask for clarification when you’re not sure.

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Dialogue Establishes Credibility

You must establish credibility with the customer and your team.



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Credibility with the Customer



Do your homework; research

Understand their business, mission, and objectives

Collaborate on ideas – ask, ask, ask

Mutually explore a value proposition

Focus on benefits

Communicate early and often

Often, the best relationship wins

People buy from people and from people they trust.

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Establish *Internal* Credibility

- Lead by example be visible
- Set high expectations for the capture team
- Focus on increasing Pwin
- Work from a position of knowledge
- Be accountable
- Create and execute win strategies and an action plan
- Embrace process and discipline
- Make tough bid/no-bid decisions

"If you fail to plan, you are planning to fail"
— Benjamin Franklin

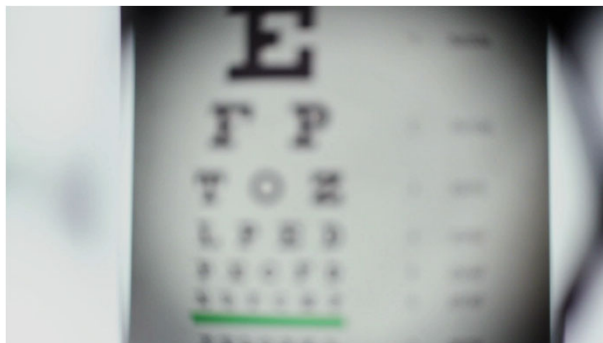


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Add Value with Unique Insights to Customers

- Provide direct insights – personal interactions/engagements
- Bring clarity – news/articles, internal discussion
- Be present - events/awareness – conferences, industry days, network
- Understand the political landscape
- Share observations - past performance, demonstrations
- Be fiscally aware



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Don't Ignore Networking and Social Media

“Strategic use of social media comes down to providing compelling content and engaging with *key influencers* and *decision-makers* who can enhance business growth.”

<p>Excellent for organization and individual. Add-ons available: (<i>Sales Navigator, Recruiter, SlideShare</i>)</p>	<p>Excellent way to convey real-time information. Good customer and competitor intel tool.</p>	<p>In the news. Strong reach for viral content distribution. (<i>Be careful—know the latest.</i>)</p>	<p>Often viewed as promotional platform. Excellent way to showcase product or features. (Caution)</p>
<p>LinkedIn </p>	<p>Twitter </p>	<p>Facebook </p>	<p>Instagram </p>

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Consult and Collaborate on 6 Focus Areas

01	COST —dollars, time, and risk	04	FIT —does it solve the problem
02	EASE —to buy and operate	05	PERFORMANCE —quality, reliability, and capability
03	APPEAL —emotional attachment	06	SUPPORT —how much and how dependable

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Trust, Credibility, Questioning, Listening, and Awareness

Consult and engage at every bend in the customer journey.

- Be trusted
- Connect by asking and listening
- Focus on the relationship
- Know their business



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Summary Consultative Capture



- Balance the tactical with the interpersonal (trust)*
- Prepare and ask meaningful questions—listen*
- Diagnose before you prescribe*
- Create value in how you engage, not just your solution*



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Questions and Discussion



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amcgeady@shipleyswins.com
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