Stop Using Capability Statements

So you've got that big meeting. You've researched the client and you are ready to meet them. All you need now is a nice big credential or capability statement telling them all about what you do and how great you are, right? No, wrong.

While it is tempting to have something up your sleeve for when the conversation dries up, and it may also act as a nice comfort blanket for you, the impact it may have is at best minimal. Realistically, no great meeting has ever concluded with the client saying "That's great, now what I really need is something generic, and all about your company, so I can make my decision"

So why should you stop producing credential or capability statements?

1. **Too self-orientated.** They are inevitably all about you and your company. What you do, how great you are, how many employees you have, how many offices or even better, how you are global – wow! There is danger that you can come across as arrogant or only interested in yourself. While the client may have some interest in learning more about your company, in a first meeting they really want you to get to understand them more and find out what their main issues are. Which leads to my 2nd point …

2. **Too assumptive.** We all know that assumptions aren't a good thing. So why produce a document ahead of time which assumes you know what service or product the client is looking for? You need to have invested time in understanding them fully before you can think of providing them with relevant information.

3. **Too salesy.** Because you have a nice glossy capability statement, and probably because you have invested time and money in producing it, you'll feel inclined to use it. The moment you whip it out of your bag and slide it across the desk in a meeting, whatever has happened before, you are now selling yourself and your company to the client. They will feel like you have probably asked some questions as lip-service for the moment when you can strike and start pitching at them.

4. **Too wasteful!** Most generic material gets binned (hopefully recycled at least). So do you bit for our planet - don't produce it.

So what should you do instead?

1. **Prepare for the meeting.** Rather than produce a document based on assumptions, why not prepare some really good questions that will: a) help you understand your prospect even better, and b) even more importantly, will help them unpack some of their thinking on whatever it is they are working on.

2. **Understand your case studies / stories.** I've often heard people say, "I need a document so the client can see what we have done." While this is important,

it is your job to understand yours and your colleagues' stories, so if required you can tell these in the meeting, at a point which is appropriate. Rather than producing glossy brochures, you'd be better investing in collecting and storing your case studies effectively. This will also help you with your proposal responses.

3. **Change your focus for the meeting.** Don't go to the meeting aiming to promote your product or services. Instead go with an open and inquisitive mind and seek to understand and help the person you're meeting with whatever's important to them. Do this and you're on the path to starting to win their trust.

If, later, you need to produce a document at the client's request, this will give you the perfect opportunity to ask them what they'd like to see in that document. That way, it should be just what they are looking for. In many cases it is a shorter document, which is much easier and more enjoyable for you to write too.

I once worked with a Partner at a big 4 Advisory firm (who I respected for his tenacity), who had come from an I.T. systems sales background. His approach was that he didn't write a proposal until he was almost 100% certain of winning the work.

His approach was to ask lots of questions (to get a deep understanding of the issues) and present a lot of 'war stories' to demonstrate that he and the firm had the requisite expertise and experience. It's about 'showing' rather than 'telling' – and 'showing' is relating actual examples, whereas 'telling' is saying that you know how to do something without providing any examples.

He always asked the client if they actually wanted a proposal – and he told the client what the proposal would include. So he is taking control of the buying process. (Note I said the "buying" process, not the "sales" process).

In this way, the proposal becomes a summary of the important things that have been discussed and it is really just a scoping document. There are no surprises. The client is ready to buy. You are in control of the process, and importantly, giving the client what they want.

The document has been requested by the client, it contains information that the client has said they want to see, and it is highly targeted. Much better than a "hit or miss" capability statement.

The key take-away's from this lesson are:

1. Generic capability statements are a waste of time.
2. Listen to the client first, and write in response to what you hear.