

Green Team Reviews

Collaborating to Improve Your Odds of Winning

“**H**ow do you always seem to create outstanding, creative proposals?” I asked a partner in a consulting firm that has won many assignments from and completed great work for us.

“Can you keep a secret?” the partner replied.

“Probably not,” I said, “especially if my organization could use that secret to make our own proposals to our potential customers more effective.”

“Well, I’ll tell you anyway,” she said. “It’s not really a secret, but we have found a wonderfully effective process that uses our firm’s collective knowledge to great advantage, especially when we are faced with extremely complex issues. Harnessing our collective strength, our collective wisdom, multiplies our ability to ‘work smarter.’ And this ‘secret’ can also work to improve your own selling opportunities. Our process is based on four key assumptions.

“First, proposal inquiries are an opportunity to build a long-lasting relationship, an opportunity to learn, to educate, to persuade, to sell—from the moment you, our potential client, first meet us until you make a final consultant-selection decision. This context drives us to look for opportunities to share our perspectives, capabilities, experiences, and qualifications throughout the business-development process. We view every interaction with you and your colleagues as an opportunity to offer

value—sometimes implicitly, sometimes explicitly—that could benefit you and your organization now and in the longer term.

“Think about all the logical and psychological factors you discuss in your book, including the anecdotes about selecting a car mechanic or a remodeling contractor. Well, we apply similar concepts to selling professional services to both existing and potential clients. We view every step, each interaction, in the selling process as an opportunity to build a relationship that will make you feel better about us and the value we can provide.

“Second, there is significant competition for your work because you are considering other well-qualified consultants, either individuals or firms, and each desires your business. We assume that our competitors will work as hard as we will to win. We like solving challenging problems and helping clients implement measurable change in their organizations, but we know that others may be as capable as, or even more capable than, we are for any particular issue. We know that you have many good choices among consultants and that many of them can do high-quality work.

“Third, a business-development opportunity must be viewed holistically, as a series of interrelated events and behaviors, any one of which could be the difference between the few evaluation points separating winning and losing. We do all we can to meet our commitments, whether it’s arriving on time, listening empathetically in discussions, asking insightful questions, sending information you request, or meeting promised deadlines during the business-development process. We come as prepared as possible and try to put ourselves in your shoes.

“Therefore, our proposal team debriefs frequently as we speculate about why certain responses were made to our questions and why you asked the questions you did. We also extensively research your issue, your organization, your markets, and your competitors. We work hard to demonstrate how much we care about you both collectively and individually. If we didn’t care, we couldn’t do our best to identify how we might be able to help.

“Finally, we look for any opportunity to provide benefits to you during the business-development process. These benefits are almost always insight related as we share our knowledge about and experience with your current situation. During this time, we are particularly sensitive to our manner: how we do and say things, how we relate to you and your team, how we share our perspectives to answer your questions.

“We keep reminding ourselves that there are no right and wrong approaches or answers in business development. No ready-made prescriptions to apply. No rules about how to play the game. Everything is situational, dependent on your specific issue, history, people, timing, and priorities. This dependency is one of

the reasons why our work is so fascinating. Nothing is black or white, only varying shades of gray.

"In a word, our secret is collaboration. We put collaboration into practice for your benefit, and, of course, our own. We have developed a process, a technique, for working jointly to get many of our best minds (even those not directly involved in the proposal effort for your organization) involved to help us review and improve our selling efforts to you."

During the rest of our conversation, I learned that the partner's firm does considerable business with the U.S. government, including the U.S. Army, which uses a technique called a Red Team Review when it considers whether to invest in new matériel/weapons systems.

The premise of a Red Team Review is this:

Before submitting a proposal, you increase your odds of winning if you determine your strengths and weaknesses and then identify and implement actions to leverage the former and eliminate the latter.

The consultant's firm borrowed and modified the red team concept and applied it to its own business-development efforts, but it changed the color to green to accord with one of Edward deBono's colored hats.¹

According to deBono, developer of numerous creative-thinking methods, different colored hats can be used to signify different styles of thinking. By focusing on one aspect of thinking at a time, you reduce confusion in your mind among multiple objectives. In his book *Six Thinking Hats* (Back Bay Books, 1992), deBono suggests that you and your team choose one of the six colored hats to wear at a particular moment. You figuratively put on a different hat, a different framework for thinking, and then everyone plays the role defined by that hat. In this way, individual egos are protected because everyone is wearing the same color hat. The hats allow you to think and say things that you might not otherwise think and say. They are a liberating device.

In deBono's model, the green hat represents new ideas, new concepts, new perceptions. It encourages the deliberate creation of new ideas, alternatives, and more alternatives. In essence, it seeks to identify new approaches to a situation. Green is deBono's color for this hat because "green is the color of fertility and growth and plants that grow from tiny seeds." Green is the symbolic color for the thinking hat specifically concerned with creativity, new ideas, and new ways of looking at things, escaping from the old ideas in order to find better ones. DeBono suggests why green-hat thinking is so difficult, for me as a client as well as for you:

For most people . . . creative thinking is difficult because it is contrary to the natural habits of recognition, judgment and criticism. . . . The brain is designed to set up patterns, to use them and to condemn anything that does not "fit" these patterns. Most thinkers like to be secure. They like to be right.

Creativity involves provocation, exploration and risk taking. . . . You cannot order yourself (or others) to have a new idea, but you can order yourself (and others) to spend time trying to have a new idea. The green hat provides a formal way of doing this.

So the consultant's firm structured a Green Team Review process, a technique to analyze its selling strategy and proposal-development efforts before submitting final proposals. In so doing, it purposefully takes off another of the six colored hats, the black hat. The black hat is specifically concerned with negative assessment, with criticism, with what is incorrect and will not work, with risks and dangers. This hat is the one that most consultants are paid to wear when they conduct projects for clients, when they identify problems and solve them. While black-hat thinking plays an important and often crucial role in problem solving and decision making, this negative orientation is not appropriate all the time.

Therefore, before a proposal is submitted, while there is still time to modify the offering (or improve personal relationships with the potential client), green-hat thinking can offer new information, new possibilities, constructive ideas to build on. Subsequently, all the logical, legitimate, critically important negative aspects of a situation can be considered with black-hat thinking.

Many consultancies have adopted the Red Team Review technique, which traditionally occurs after the document has been assembled. Those who have written the proposal, as well as many who have not been involved in the business-development process, gather to examine the document, often ripping it apart and suggesting dozens if not hundreds of changes. Imagine that you had managed the proposal-development effort and were involved in the Red Team Review, listening for four hours or sometimes longer than a day as hundreds of revisions were being recommended. After hours of such discussion, you would feel that each new recommended revision was unbearable, knowing that the proposal would have to be almost entirely rewritten (and submitted in less than a few days).

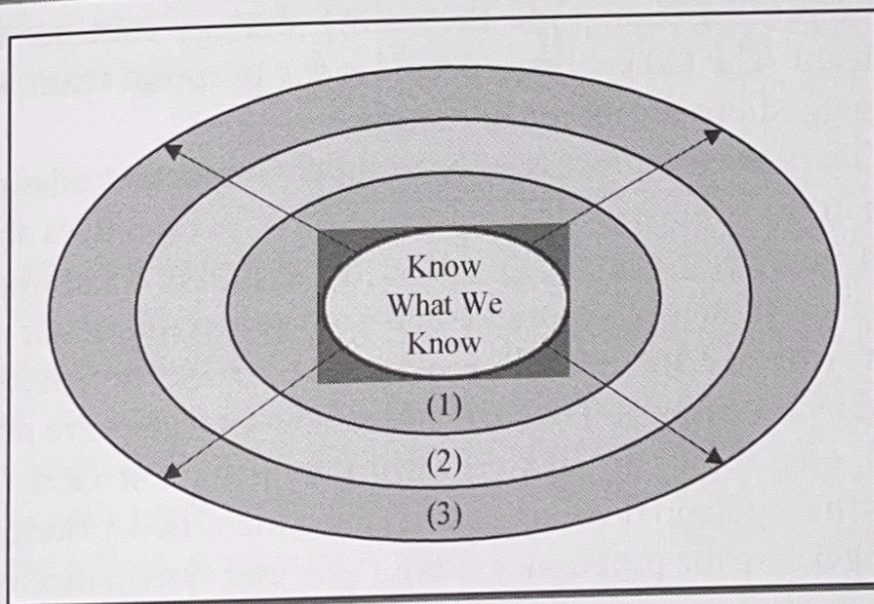
In the rest of this chapter, I will show you a different process, one that can occur at any time during the business-development process, even (in a proactive lead) before you have had your first meeting with me. Instead of taking hours, this process takes minutes (40 minutes to be exact).

The Strategic Premise of Green Team Collaboration

The Green Team process is specifically designed to change participants' behaviors from black-hat thinking to green-hat thinking, from "what won't work" to "what may be possible." In facilitating this change, the process attempts to expand the proposal team's knowledge, moving beyond what it currently knows so that it also learns what it doesn't know and discovers what its firm knows, and beyond. (See Figure 8.1.)

Figure 8.1 displays these four levels of knowledge. Most people write proposals based only on what they know, and many times they are successful. They work from a base of knowledge represented by the smallest circle in the Figure 8.1. They have interacted with me and others in my organization, have tried to work smart, and "know what they know." Based on what they know, they prepare the best proposal they can.

Unfortunately, they sometimes lose because of what they don't know, because of the many red flags used in the work sessions of this book that represent a lack of information, risks, and vulnerabilities. They don't try to determine what their proposal team doesn't know. Quite often a proposal team, like a sports team, is



- (1) Know What We Don't Know
- (2) Know What the Firm Knows
- (3) All There Is to Know

FIGURE 8.1 The strategic premise of the Green Team Review: expanding your team's base of knowledge

optimistic, feeling good about its competitive position and chances of winning. This optimism may blind the team to potential biases, hidden problems, and risks. Worse, they fail to determine what their firm knows, other broader perspectives of which the proposal team is unaware. This collective wisdom is the combined knowledge, the sum of intellectual capital, capability, and experience of others in the firm not directly involved with the proposal team.

Beyond this level of knowledge, of course, is "all there is to know." There will always be more information, more intelligence, than any individual, team, or firm will ever know. Your goal during business development should be to expand your base of knowledge, going beyond what you know to what you don't know and to what your firm knows. You can do that by using a 40-minute Green Team Review.

The Green Team Review: What It Is

The 40-minute Green Team Review is a focused, high-impact process through which a proposal team can expand its knowledge and improve its selling strategy by learning what it doesn't know and what the firm knows. With this increased knowledge, the team can be made aware of and choose to execute strategic actions that leverage its strengths and/or offset its weaknesses relative to its competition. The Green Team has no direct line of authority; ownership of the lead and decisions regarding changes to the selling strategy continue to reside with the proposal team. The Green Team provides the proposal team with constructive, creative suggestions for its consideration.

The Green Team Review process seeks to supply important missing, unverified, and uncertain information as well as information or perspectives about which the proposal team might not completely agree. Information, most likely the lack of information, in any of these categories could pose vulnerabilities or red flags to the proposal team's firm as I and my colleagues make our selection decision. Red flags are not created by the process. They already exist even if they are not identified or acknowledged, even if they are hidden within my firm. The Green Team Review process allows these potential vulnerabilities to be identified, prioritized (given the time remaining before the proposal is submitted), and systematically addressed.

The Green Team: Who It Is

Ideally, the Green Team includes six to twelve individuals who are not directly involved in the selling opportunity and who can provide a range of different perspectives, attitudes, and points of view. They might bring to the Green Team Review different functional perspectives (e.g., marketing, information technology, manufacturing, logistics, finance) as well as different leadership styles (e.g., the Myers-Briggs

descriptors—Intuitive, Sensing, Thinking, and Feeling—or more simplified matrices that use categories such as Controller, Analyzer, Promoter, and Supporter).

By including individuals with different industry and geographic experiences, as well as different styles of thinking, you can configure a Green Team with perspectives well beyond those of your proposal team. In brief, you're asking the members of the Green Team to use their range of experience and expertise to imagine my mind-set and to view the proposal team's thinking as if they themselves were I and my colleagues. This orientation allows the Green Team to consider the proposal team's thinking from divergent perspectives.

How do you persuade your busy colleagues to participate and to collaborate on selling opportunities about which they haven't even been involved and about which they know little or nothing? You design the review process to be quick and to the point, but not judgmental and not open-ended. Even the busiest people can spare 40 minutes to help their colleagues improve their chances of winning important opportunities—if you honor their time commitments. You can with a properly structured Green Team Review.

The Green Team Review: How It Works

As Figure 8.2 illustrates, the 40-minute Green Team Review includes five distinct steps, each with a specific task, that together are aimed at identifying creative potential actions to improve your probability of winning.

Step 1: Listen

During Step 1, the proposal team presents, without interruption, the most important elements from the Logic and Psychographics Worksheets (which should be poster-size and taped to the wall),² the logical and psychological elements of its thinking about the proposed problem or opportunity to date. The Green Team listens silently and takes notes. This fast-paced, to-the-point presentation must, by design, focus only on the big picture and identified red flags, not on less critical details of the selling situation. A timekeeper (who must not be a member of the proposal team) alerts the proposal team's presenter(s) at several checkpoints to ensure that this high-level overview is completed within 15 minutes.

Step 2: Ask

In this step, members of the Green Team ask questions of the proposal team to understand the lead better and to determine weaknesses or red flags that have not yet been identified. As the proposal team responds, the Green Team "fills in the blanks" of its understanding of the lead's current status. Since only 10 minutes is

Step	Who	Task	Timing (min.)
1	Proposal Team	Present overview of logical and psychological aspects of proposal thinking to date	15
2	Green Team	Ask questions; identify red flags	10
3	Both Teams	Summarize strengths and red flags	5
4	Both Teams	Brainstorm potential actions to improve positioning	10
5	Both Teams	Debrief	----

FIGURE 8.2 Timing for the 40-minute Green Team Review

permitted for this step, questions and answers must be direct and without editorial comment. Questions should be stated constructively (“Were you able to discuss X with the VP of marketing?”), not judgmentally (“Why didn’t you discuss X with the VP of marketing?”). Obviously, you want to avoid questions that cast aspersions, implying that the proposal team has been less than diligent in its efforts.

Step 3: Flag

During this step, the Green Team and the proposal team spend five minutes summarizing the proposal team’s strengths (green flags) and weaknesses (red flags) given the information from steps 1 and 2. One or two recorders or scribes (again, not members of the proposal team) display the responses with a data projector or preferably, write them on flipcharts. The responses should be divided into the two categories, strengths and weaknesses. During this rapid-fire listing, the scribe record what is stated as quickly as possible. No discussion, clarification, or evaluation takes place during this listing. Because strengths and red flags may be called out in any order, it is helpful for the respondents to voice their comments as follows:

- A strength is . . . our relationship with the economic buyer.
- A red flag is . . . we haven’t quantified benefits.
- A red flag is . . . we have no coach.

- A strength is . . . well-defined deliverables.
- A strength is . . . good project work we've done in another division of the potential client's organization.

Step 4: Strategize

Using the lists of strengths and red flags that are now taped to the wall and were created as a starting point for green-hat thinking, the proposal team and the Green Team call out, in a 10-minute brainstorming session, as many potential improvement actions as possible. Beginning their suggestions with an active verb, participants randomly suggest widely varying ideas such as the following:

- Call Neil Nakadate in our Tokyo office to learn about his experience with [this client] last year.
- Talk to Bjorn Ryns about the benefits we actually achieved for Company X on a similar study.
- Add Brian Brown to the proposed project team to utilize his experience with [the potential client's industry].
- Propose an initial scoping phase to better quantify the measurable benefits from [some action].
- Drop the lead if we are unable to meet the economic buyer.
- Check to see if we have any relationships with members of the Board of Directors who could influence buying committee members.
- Invite the VP of marketing to our international seminar on [whatever] next week.
- Ask our research department to find out the background of [a member of the buying committee we know little about].
- Apply Neuro-Linguistic Programming techniques to mirror the behavior of [a difficult user buyer].
- Change our project leader because of potential personality differences [with client personnel].
- Structure a pay-as-you-go fee arrangement based on the potential client's actual accrual of benefits.
- Invite the VP of manufacturing to visit [a past satisfied client] to discuss how we worked in a challenging union environment.
- Emphasize the theme of urgency to reflect our ability to generate measurable results quickly.

My consultant friend, the one I was talking to at the beginning of this chapter, told me that some of her Green Team Reviews have generated as many as 40–50

potential actions, all called out and transcribed without any comment, discussion, or evaluation (either good or bad) from Green Team participants, all during the 10-minute brainstorming session. Subsequently, the proposal team uses black-hat thinking to evaluate the potential actions, but only after the Green Team has dis-banded. During the brainstorming, there are, by definition, no bad ideas. In fact, off-the-wall ideas are encouraged: They can lead someone else to identify what later is judged as another good idea.

Step 5. Debrief

After the first four phases of 40 minutes of elapsed time, the Green Team Review is officially over, and some members of the Green Team may have to leave. They should be excused and thanked. Others should be invited to stay for a quick 10-minute debriefing, since their initial feedback could be helpful. All Green Team members should be encouraged to continue thinking about the lead so that they can suggest other improvement actions that come to mind over time.

The Green Team Review: What Happens Afterward

The Green Team is encouraged to be creative, to stretch its thinking to identify linkages to other people, projects, and experiences that, if implemented, might help the proposal team improve its offering. The key word is "might": The process identifies actions that the proposal team will subsequently consider and potentially execute as it sees fit. There is no measurement system that evaluates the value of specific ideas or suggestions. In fact, there is no requirement that the proposal team use any of the Green Team's suggestions.

After the Green Team Review, the proposal team's assessment of the potential actions might be something like this: Out of these 40 potential actions, these 10 we've already thought of (though they've now been reinforced), these 10 we don't have time to implement (though we might have, if we had held the Green Team Review earlier), these 10 are the silliest ideas we've ever heard (though some of them led to other, incredible ideas), and these 10, if we implement them, could significantly improve our probability of winning.

In short, the proposal team retains accountability for the lead; it determines how best to proceed, how best to win. But this determination is accomplished with a much higher degree of confidence, with the knowledge that a wide variety of colleagues with differing perspectives and points of view have reviewed the logical and psychological aspects of the selling efforts to date.

Green Team Reviews: Some Final Thoughts

Proposal team leaders and members typically find themselves working against the clock, unable to do all the things they want to do to prepare an outstanding proposal. There is no shortage of actions the team would like to execute, but time is almost always limited. So getting ready for a Green Team Review with colleagues, some of whom may be in senior positions, could be perceived as threatening or time-consuming: "The Green Team will highlight what we don't know, what we haven't done. They'll identify actions we should have taken. They'll see that we don't have our act together."

But consider this: Many, if not all, proposal teams lack complete information and have a long list of potential actions they could have taken and haven't, at least not yet. Many don't have their act together—yet. All this isn't really surprising to anyone who has seen how you work. There is never enough time; there are seldom enough resources. Remember: As your potential client, I don't ask you to help me answer easy questions. This is the essential nature of the business.

The value of Green Team Reviews, if they are done early enough in the process, is that broader, more experienced minds will help identify improvement actions (and potential additional resources) that leverage not just a proposal team's capability but also that of the entire organization. Even the Lone Ranger had Tonto; even the sheriff had a posse. The collective knowledge in a Green Team Review process helps overcome one of Murphy's laws: Experience is something you don't get until just after you need it. While Green Team Reviews do not create additional time, they do focus efforts that can be instrumental to better utilize your available time and resources, certainly for the select leads that you really want to win.

The bottom line is this: Green Team Reviews can provide your firm's management with the ability to understand and better support business-development efforts. With the power of today's information technology, your best people from around the world can participate, making the proposal team aware of the knowledge and experience of others in the firm, helping the team members learn what they don't know and what their firm knows. This collaboration, whether in person or virtually, can certainly improve a team's odds of winning, providing some of the two to five points that make the difference between winning and placing second.

By the way, can you think of a more effective professional-development opportunity for training new consultants? "Welcome to Paramount Consulting. . . . We'd like you to watch (or even participate in) a Green Team Review for our lead at ABC."