



Why Design Firms Lose Shortlist Presentations

SUMMARY

In this paper, we review our findings and report the four most frequently cited reasons why design firm shortlist presentations fail. In addition, we cover strategies and techniques for ensuring that this never happens to your firm.

RESEARCHED AND WRITTEN BY



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Introduction



For design professionals, shortlist presentations can be one of the most powerful, productive, and valuable means of securing business. They are, however, different from other business presentations. They have unique requirements, expectations, and challenges. When any of these are not met, failure can be imminent despite the prominence of the design. Likewise, specific behaviors, skills, and techniques can help ensure their success.

For nearly 60 years, The Speech Improvement Company has been helping design professionals nationwide win shortlist presentations. During 2022-2023, we interviewed architects, design professionals, senior executives, and their clients from various industries.

Collectively, they provided information and insights from more than 4,000 shortlist presentations. We asked each of them to describe the most salient factors that caused them **NOT TO BE HIRED**.

We coupled that research data with the insights and experiences from the training and coaching we have done with more than 100 design firms and more than 3,000 individuals in those firms, whether on the East Coast, West Coast, or somewhere in between.

During our research, we asked these many design professionals for their first-hand experience. Additionally, we found it helpful to communicate with the decision-makers, members of selection committees, clients, prospects, and others involved in deciding who won and who lost.

In the following pages of this white paper, we will report our research findings on **the four most frequently cited reasons why design firms shortlist presentations fail**. In addition, we will offer strategies and techniques to ensure that this never happens to your firm.

Our goal is to help our friends in the design profession develop the skills to deliver an exceptional presentation that will help you stand out and, more importantly, win those shortlist presentation opportunities.

Here is What Loses

You have been invited to participate in a shortlist presentation along with a few of your competitors. These other firms are also well-qualified to present their approach to the project. You have completed and returned RFPs, had a site visit, communicated with the appropriate client personnel, and shown your firm worthy of being on the project's shortlist of possible partners.

The client chose someone else. Why did you lose?

In no particular order, here is a brief look at what our research reveals are the four most frequently cited reasons for this result:

01

Not Creating Team Affect

This term is a collective description of not creating a "good feeling" or establishing "rapport" with the client. This concern was mentioned in many different ways. There is little doubt that developing a positive non-technical relationship is very valuable. The typical causes of not establishing this kind of rapport are, in no particular order:

- Getting names wrong
- Being boring presenters
- Avoiding eye contact
- Not being passionate about the project
- Seeming to lack energy or synergy
- Failing to present the approach clearly
- Failing to exude a partnering relationship



Team Affect had little to do with the actual technical skills of the presenting firm. This concern is more related to the depth of human connection you make with the listeners. Connecting with your listeners is crucial to winning shortlist presentations and sets the pace for a good working relationship.

“*Connection and chemistry
- without it, you lose.*”

Jennifer Storey, AIA EDAC 
Principal
Stantec Architecture



02

Not Being Organized

First, don't get ahead of yourself. We discovered this does not simply mean making sure that you correctly arrange the speaking order of your team, double checking that you have all your materials, or that you stay within time limits. Most firms deal with these issues in a professional manner.

This is more about how you structure and order the various types of content contained in your presentation. The panelists are looking out for how you intend to arrive at the results in an organized manner and how you can measure the project's success.

If you see your presentation as an opportunity to “relate” or “report” on your knowledge or approach to the project, you will lose. Panelists are not looking for your firm's credibility or

your ego; you were invited in the first place because you were considered credible enough.

Spend less time discussing your firm and more time on the client's specific needs. If you cannot present the story of what, why, and how your approach matches the hopes and dreams of the client in an organized, easy-to-follow manner, you will lose.

A shortlist presentation is more than just org charts, spreadsheets, cost estimates, time management, and attractive drawings. It must create the belief and trust that your approach is absolutely the most effective and efficient way to bring the client's dreams to reality.

You must bring the appropriate people. You must identify the key concerns and desires

of the client. Using too much technical jargon to impress or a vast download of information and ideas may not help you get the best of your client's attention; instead, it creates a wall between you and them.

Our research shows that these seemingly obvious elements are often either not addressed in enough depth or not at all.



03 *Not Using Visuals Effectively*

Design professionals may have the fundamental belief that their renderings, drawings, and illustrations contain the most salient information needing to be communicated regarding the project. It certainly is true that the ability to display ideas visually is imperative to helping people understand and approve of the suggested approach for the project.

Additionally, it is true that there are people who do not learn best by “seeing” a drawing. A significant number of people learn best by “hearing” about a drawing. Some people learn best by being able to handle, “touch,” or explore the project model.

This concern for using visuals has several other dimensions. These include:

- The inability to help the client/audience smoothly follow the oral explanations of the drawings
- Presenting a drawing with little or no introduction or guidance
- Not displaying drawings in an organized fashion, color, or size
- How the visual is presented (e.g. using slides, boards, or videos)

Visuals should effectively deliver the intended key points. Any one or two of these elements that are not addressed prior to the presentation can easily lead to failure and losing the competition.

Not Telling a Compelling Story

Our research has shown 100% agreement on this being a primary reason for losing shortlist presentations. It has several dimensions, and any one of them could result in a loss. In no particular order, we heard about:

- Lack of understanding of client's needs
- Choosing the wrong people for the presentation
- Lack of passion for the project
- Poor basic presentation skills

These will all lead to failure. Clearly, there is an overlap among these. However, each of these elements provides a distinct value; if your team members are not on the same page and lack the same level of passion for telling the story, you lose.



Client Spotlight



*“Dr. Becker taught us the right way to deliver **high-caliber, persuasive, short list presentations.**”*

David Nagahiro
AIA, NCARB, LEED AP
Principal & President
CBT Architects

CBT is an award-winning architecture, planning and design firm working nationally and internationally on projects at all scales. The firm’s work ranges from multi-family residential and workplace projects to educational and civic/cultural projects; and large-scale mixed-use developments and urban district master plans. CBT’s work and leaders have been recognized worldwide for excellence within the design industry.

The firm is recognized for providing strategic design services in a broad range of project types and styles; their proven real estate acumen; and their skill in blending high-quality planning and architecture with practical goals of building performance, budget, and schedule. The core values of the practice are innovation in every design commission, social responsiveness in the community, and the continued advancement of research and discovery in all that the firm undertakes.

CBT’s design studio is a living laboratory for new design ideas, deploying future-forward workplace design and technological approaches that elevate creativity and collaboration across multiple settings. David Nagahiro, Principal and President of CBT notes, “We are advancing our creative practice and how we design; it’s a very different day than it was before. Recent global events ended up being a catalyst for the way that our firm works, and has allowed us to rethink everything.”

Recent notable and award-winning projects include the AIA-award-winning Suffolk Downs Master Plan and the Woburn Public Library; Park 151 and the master-planned Cambridge Crossing; Masdar City in the UAE; and Bulfinch Crossing Master Plan and several buildings within the plan. In 2022, the firm was named Architecture Firm of the Year by the Boston Real Estate Times. www.cbtarchitects.com

Here is What Wins

01

Creating Team Affect

Winning begins with mindset. The mindset gives primary value to the need to be professional, proficient, and personable. You clearly have the first two, or you would not have been invited to the shortlist presentation.

These behaviors will exhibit themselves in how your phones are answered, your emails are handled, your promptness and appearance at appointments, and more. However, the third, “personable,” is too often given simple, polite treatment.

The mindset of “*the work should speak for itself*” will not win. Clients know they are selecting people with whom they will be working closely for a long time through some delicate and difficult times and decisions. They want to be sure you are not just capable but that you are comfortable to work with.

As a presenter, you may or may not be dealing with highly knowledgeable people. Either way, your mindset and attitude toward the project will be seen and felt. As a result, any of the aforementioned “mistakes” could cost you the job.

When you are going through your practice runs, watch for opportunities to create this rapport. Coach each other on what is and isn't working and when opportunities present themselves to demonstrate your personable style of speaking and listening. Coaching and feedback can quickly point out something important you might have missed that could make a significant difference. In addition, these simple behaviors will make an impact and help you win:

- Don't act it out
- Be yourself
- Allow your authenticity to show through
- Don't memorize your presentation
- Make eye contact with anyone who speaks
- Use names whenever possible
- Listen intently; to understand, not just to respond
- Be sure each team member shows their passion
- Limit answers to no more than 60 seconds so you are clear and concise



Additionally, be courteous when entering the room: Show respect for the furniture, the lighting, the temperature, your materials, and people's personal belongings.

Remember, the presentation begins the moment you pull into the parking lot or get off the elevator, NOT when you are in the room and all set up to start. It's ALL presentation – showing the client what it will be like to work with you.

All these and more will help create that intangible feeling of rapport. Clients need to know that you understand and respect them as much as you are passionate about the project. These are the keys to *Creating Team Affect* and will help you win.



“*The difference between art and architecture is the ability to explain the difference.*”

Hugh Shepley, FAIA
Former Partner
Shepley, Bullfinch and Past President
of the Boston Society of Architects

02 *Being Organized*

This sounds basic. When we first heard this, we had to delve a bit deeper. And sure enough, there is more meaning than just the traditional idea of "organization." Ideas and specifics must be delivered in an organized fashion that is easy for the listener to follow.

That is a simple fix that many design professionals seem to miss. Here is a straightforward four-step format to organize your presentation:

Step 1 - Introduce what you are going to talk about, what you will do with visuals, how long it will take, how you will handle questions, and of course, your name and responsibilities on the project.

Step 2 - Why should they listen to you? What valuable information are you bringing to their decision-making? Think of it this way – if you can't express this in a concise, confident manner, don't expect them to make it up.

Step 3 - Present your salient and essential information. This is the body of your presentation and may take the longest to complete. It is the bulk of your storytelling.

Step 4 - Review what you told them. This is a short review of the most important things you want them to remember. Do not review everything; that is unnecessary and boring. Lastly, conclude with an action statement where and when it's appropriate.



But wait, there's more! Indeed, this proven four-step outline is highly effective. Still, our research showed that being organized also includes the following:

- Bring the right people to the presentation. Clients want to hear from those who will actually be doing the work.
- Use the appropriate senior-level person. Do not simply bring them as a name and title. They should have a significant role in the project and be able to state that concisely.
- Ensure your team is deeply informed about the project, has visited the site (if appropriate), and is familiar with the terms of the RFP and the client's dreams, not just the logistical requirements.
- Be sure that you've spoken with each client team member prior to the shortlist presentation.
- Show that your team has a working knowledge of the latest technology, such as AI and VR.
- Indicate that you are aware of the political and local community issues and concerns.
- Be clear about the value of communication with the client throughout the project's duration.

Some of these may not seem directly related to the term "organization," yet all of these concerns and alerts were communicated to us as we conducted our research throughout the nation with various design firms and professionals. The point is that they considered these items as part of being adequately organized if you expect to win.



03 Using Visuals

We heard several common remarks as we conducted our research, all of them related to the value and critical part of the shortlist presentation that the visuals play. As we parsed these comments, we found a shared concern about the **use of visuals**.

To be clear, we are not just referring to boards or slides, videos, or models. Of course, those tools are crucial to the understanding and acceptance of your approach. The critical comments were mostly about how these tools were used. As expected, there were many comments. Here are the highlights of what you need to attend to regarding the use of any visuals:

- Sometimes, you should use the visual to support what the speaker is saying, and sometimes a speaker should be the support to the visual. You must know the difference and plan accordingly.
- Visuals can often, of necessity, be technical. Know when people on the client's team may not be as technically savvy and need clarification.
- Do not regard this as simply "dumbing it down." Those people are on the client team for a reason. Show them the appropriate amount of deference; this demonstrates what it's like to work with you. That behavior will also prove to the team that you are sensitive and attentive to client needs.
- When you have visuals that may be busy or complex, use the tool known as "navigation." Guide the viewers where to look and when as you review the visual's content.

There are three simple guidelines for using visuals:

1. Synchronization - The client should see the visual when you are ready to use it, not before or after. They should be seeing the same thing you are speaking about simultaneously.
2. Introduction and Set-up - Always introduce the visual, whatever type it is, **before** you show it. As you introduce the visual, direct the viewer where to look and focus their attention.
3. Talk and Do - This is the ability to talk while you are doing things. If your computer crashes, continue your presentation while a colleague tries to fix the problem. This also shows how you might deal with unexpected issues on the job if they hire you.

We have heard many tragic, but also humorous stories about using visuals. At some point, perhaps, we'll report specifically only those things. There are also so many small techniques for using visuals that are unique to your presentation. Know that your visuals are only part of your ability to secure the job.

Your visuals should support the story of how and why you are the best firm for the project. If you manage these guidelines well, you will win.



04 Telling the Story

The client has dreams and aspirations, needs and resolutions, fears and fantasies. So, they look for someone who can guide them in creating reality from all these. Then, they come to you. How can you help bring these things to life?

If this sounds like a plot for a story or a storyline for a movie, it is. It is the client's story!



“Clients themselves *do not* understand the language of drawings.”

5 Worst Mistakes You Should Avoid When Presenting Your Interview Design Architect, 2017

In order to be cast in this movie, you need to be able to understand their story and be able to tell it to them. That is what the shortlist presentation is all about – *telling the story*.

Our research shows that all too many times, design professionals give more time and attention to telling their **own story** instead of the **client's story**. Let's be clear about what a story is.

Well-told stories can utilize and activate the five senses (sight, sound, touch, smell, and taste). A well-told shortlist presentation can trigger most of these senses. That does not mean sacrificing technical data or logistics.

It does mean incorporating critical parts of the project design into the presentation to stimulate the senses.

When we asked how to accomplish this, we received the following possibilities:

- Language and word choice
- Color and dimension
- Perspective
- Voice and speech
- Body language and facial expression
- Speed of speaking
- Quality of the visuals
- Team reaction and collaboration
- Understanding the client's dreams and needs
- Timing and organization of information

In every case, we also learned how necessary it is to the client that there were site visits, clarity of ordinances, conversations with abutters, understanding of community concerns, and the effort to develop pre-presentation relationships.

To win a shortlist presentation, there must be a balance of what Aristotle called "The Modes of Persuasion." These are:



- Ethos (ethics) - This is your firm's credibility, reputation, and the general agreement that you are exemplary people, seen as authorities in your field, and dependable to work with. You have enough of this already if you have been invited to the shortlist.
- Pathos (emotions) - This is your ability to show that you understand and possess the desire, excitement, and passion for the project. We heard the word "passion" many, many times, by the way.
- Logos (logic) - This, of course, is your ability to show that you have and know how to complete the project successfully. This is about your technical expertise. Your prior work is evidence that you have met this challenge in the past. Can you do for their dreams and needs?



So, winning the shortlist presentation means accepting that telling the story is all about your ability to blend these three Modes of Persuasion into your presentation. That all happens in part by how the story is constructed and in part by how the story is told.

The adage, "*products don't sell, people do,*" carries much validity in shortlist presentations. It can't be overlooked that the "product" is not only what you show with boards, videos, slides, or models. The truth is that every member of your team is part of the product.



Clients know they will be in a relationship with you for a long time. They want to like you, respect you, learn from you, and be able to depend on you. That means you must address their Ethos, Pathos, and Logos needs. A well-told story will do exactly that.

Telling the Story well means being part of the story. It means knowing where each team member fits into it. It means showing that, like the client, you are passionate about the project. If you can incorporate each of the four items we have reviewed and address them in your shortlist presentation, you will win!

“*Having and showing passion will win.*”

Charles Tsecker
Former Principal
CBT Architects

Client Spotlight

I have an unwavering belief that environments affect people's behavior. "Design matters!" This belief is the underlying foundation and guiding principle that has shaped Cornelia C. Hodgson's architectural practice and the formation of [c.c. hodgson architectural group](http://c.c.hodgsonarchitecturalgroup.com).

Cornelia's thought leadership is rooted in translating client's visions into innovative architectural solutions, focusing on providing sensitive and innovative designs, and a highly personalized approach to creating environments that foster quality of life.

Forging new relationships through a proposal-driven process – whether it's for non-profit, mission-driven communities or for-profit developers – is a balance between intuitive sensitivity and analytical assessment.

*“From our initial training with Dr. Becker, we recognized not only the value of developing the team's **communication skills**, but almost more importantly, the **confidence** they gained individually and as a team.”*

Cornelia C. Hodgson
Founder and Executive Architect
c.c. hodgson architectural group

Once you've passed the written qualifications of a proposal, clients are evaluating what it would be like to work with you during the short-listing process," explains Cornelia.

Those impressions are created from the moment you get out of the car, on through to the choreography of setting up the presentation, greetings and introductions, and the chemistry of the presentation – all need to exude an authentic collaboration. "We want to convey that we are a team that not only works well together, but that the client can expect the same with their organization. We want them to trust and be confident of this dynamic.

To get there requires research into the organization as well as the team that will be part of the interview process – and then aligning the values, attributes, and goals of the potential client with your own organization. "We have learned to tailor our presentations to the clients' interests, and not our own, by listening to them. You need to find out what the client values so you can be in sync with them.



Our "Academic Practicality" Approach

The Speech Improvement Company has nearly 60 years of demonstrated authority and authenticity, showing that the content in this document contains actionable techniques you can use today. Many of our coaches, including this paper's author, have studied and taught communication at the graduate level or higher in institutions as prestigious as Harvard University (Graduate School of Design) and MIT (Lincoln Laboratory).

We have collectively authored 13 communication-related books, including two textbooks. The most recent book was produced in partnership with the National Communication Association (NCA) on how to coach and train communication skills; when we say, "*We have written the book on how to be a communication coach,*" we truly have.

What others miss is the essence of persuasion, the field tests and studies on human reasoning, the current academic research on interpersonal communication, and a deep understanding of the interactions and thinking that occur on both sides of the shortlist presentation table.

The Speech Improvement Company has successfully developed practical, knowledge and experience-based communication and presentation skills training for the design profession. We refer to this approach as "*academic practicality*" because it combines the best in research with the best in the application of this knowledge. We deliver our training on three levels:

- Intellectual: Does the person fully understand what is being taught?
- Emotional: Does the person deeply believe in the value of what is being taught?
- Behavioral: Is the person able to apply the learning?

These skills are uniquely adapted for successful shortlist presentations. They are custom designed and refined by working with small and large design firms.

Clients often come to view The Speech Improvement Company as personal mentors and trusted advisors. Accordingly, more than 90% of our clients return for short and long-term follow-up service.



Effective
Training is

Intellectual
Emotional
Behavioral



Final Thoughts

Simply understanding, even embracing all the research results in this white paper, will still not ensure you will win. The real secret to winning is utilizing what you have learned in regards to delivering your shortlist presentation.

Winning requires the combination of the proper mindset of connection and relationship and the ability to tell the story through the use of proper presentation tools. There is truth in this old caution, *"You do not learn to swim by reading a book."*

A very critical step is practicing, no matter how many times you have done it before. A lackadaisical attitude or approach to preparing will cause you to lose. Take what you have learned from this white paper and practice it. Then, you will win.



About the Author

Dr. Dennis Becker is a well-known speech coach and communication consultant with over 50 years of experience in corporate, public, and private settings. He is a Founder, Principal, and Executive Coach of The Speech Improvement Company (TSIC). Based in Boston, it was the first and is now the most experienced communication training and coaching firm in the United States. Since 1964, TSIC has helped nearly 1,000,000 men and women worldwide.

Dennis has been President of the Massachusetts Speech Association and The New England Speech Association. He is an active member of The Speech Association of America and The Speech Communication Association. He is also an award-winning member of The National Communication Association, where he was Chairman of the Training and Development Division.

His clients include high-profile media organizations, sportsmen and women, businesses, political personalities, and major corporations around the globe. Various executives from leading companies have enlisted Dennis to help them with their leadership and communication skills, including Dell, Fidelity, Forrester, KPMG, Pfizer, and Sony.

In addition to teaching at both Harvard and MIT, Dennis has been active in helping communities of children and teenagers develop their communication confidence. He has written eight communication books, including the popular business text: [Speaking Skills for Business Careers](#), the industry's standard-setting book on establishing the seven best practices for training/coaching practitioners: [The Handbook of Communication Training](#), and the nation's first book identifying the most popular leadership communication styles: [Personal Communication Style: "Control the Impression You Make."](#)

His latest book is about protecting yourself from active manipulation, [Outwitting the Manipulator: Protecting Yourself in Real Time](#). He is currently in the process of two more books.

Dennis and his wife, Dr. Paula Borkum Becker founded The Speech Improvement Company, raised four children, and have eight grandchildren. He is a former senior Olympic racewalker, semi-professional basketball player, and holder of a black belt in Zen Sword. He has a great sense of humor.



Dr. Dennis Becker
Ph.D., M.A., B.S.

Founder & Executive
Communication Coach



About The Speech Improvement Company

Since 1964 the professional Speech Coaches at The Speech Improvement Company have touched more than a million people around the world. We are the oldest speech coaching firm in the United States. We support an international clientele including Fortune 500 executives, business professionals, politicians, professional athletes, entrepreneurs, and private individuals to strengthen their communication skills. We work with leaders of countries, companies, and people throughout organizations.

Most of our coaches are formally educated at the graduate level or beyond in all aspects of human communication and cultural understanding. We have both the educational background and the real-world experience to identify speaker strengths, uncover areas of need, and evoke behavioral change.

To date, we have written 12 books on communication and are published in 5 languages. We have instructed at Harvard University, MIT, and other world class institutions as well as conducting pro bono work for non-profit and community organizations. Our coaching team attends monthly development days to ensure they are apprised of the latest research, theory, tools, and trends related to human communication.

What Topics We Cover

Our focus is on helping clients strengthen communication skills for application in both business and personal settings. While each client interaction is unique, our most popular areas of focus are:

- Leadership & Management
- Public Speaking
- Sales Communications
- Customer Service Excellence
- Accent Reduction



Follow Us!

Our Clients Include

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PAYETTE

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SHEPLEY
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