

Index

- Accelerant curve, retainers and, 164
- Acceptance of proposals:
 rejecting, 39, 40
 signature and, 111, 113–114
 for successful proposals, 71–75
 twelve steps to, 178–179
- Accessibility, retainer and, 162–163
- Accidents, 108
- Accountabilities:
 accepted by buyer, 54
 joint, identifying, 184
 joint, in successful proposals, 66–68
- Accounts payable number, 99
- Acquisitions costs, reducing, 92
- Advance payments, client's self-interest and, 183
- Agenda, failure in setting, 53
- Annualized savings, 34
- Architecture of successful proposals:
 acceptance, 71–75
 joint accountabilities, 66–68
 methodology and options, 63–65
 metrics, 60–61
 objectives, 59–60
 situation appraisal, 57–58
 steps in, summary, 73
 terms and conditions, 68–71
 timing, 65–66
 value, 61–63
- Assignment-events, singular, when to stop writing, 185
- Assurances, reasonable, providing, 120–121
- Attitudes, 32
- Attorneys:
 buyers and, 116
 fee basis and, 117
 size of legal firm and number of, 117
 time to consult, 123–124
 utilizing your own, 118–119, 122–125, 132
- Audits, requests for proposals and, 143
- Authorization strategies, 101–102
- Authors, commercially published, “instant trust” and, 24–25
- Avocations, defined, 150
- Bank charges, for wire transfers, 113
- Banks, foreign, 99
- Barriers, discussing, 54
- Behaviors, 32
- Beliefs, 32
- Best practices compilations, requests for proposals and, 144
- Bidding system:
 public meetings and, 145–149
 RFPs and, 138, 139, 142
- Billing. *See also* Fees; Payment
 legal department and, 117–118
 for nondomestic firms, 111
 retainers and, 156
 terms and conditions in successful proposals and, 69
 time-based, 16
- Binary decisions, 86
- Births, 108
- Blog postings, retainers and, 166
- Boilerplate items, getting rid of, 116, 119
- Boss to buyer, obstacle related to, 108–109
- Bottlenecks, shaking loose, 54
- Bounce factor, retainers, accelerant curve and, 164, 165
- Buckingham, Markus, 165
- Budget approval, committee review and, 101
- Bureaucracy, 45
- Bureaucrats, don't argue with, 99, 100
- Business acumen, poor, 53
- Business loss, fear of, 52
- Business model:
 effective, 5
 encountering four basic objections in, 12–13
 proposal's place in, 5–9

- Business objectives:
 personal objectives behind, 17–18
 true, eliciting, 28–29
 Business sequence, simple, 130
- Butcher, Dick, 115
- Buyer(s):
 attorneys and, 116
 bespoke RFPs and, 141
 building trusting relationship with, 6–7, 18
 called away, 108
 coaching, 102
 with cold feet, 102
 delays and, 171, 172, 173
 direct relationship with, 12
 errors and, 109
 follow up after decision by, 179
 forewarning about legal implications,
 119–120
 guile and the art of meeting, 43–49
 heavy lifting by, 99
 meeting colleagues of, 183
 quickly getting proposal in front of, 179
 RFP design and, 140
 RFP situations and relationship with,
 139–140
 stressing your importance to, 175
- Calgon:
 case study, 163
 emergency meeting for, 162
- Careless comment case study, 103
- Case studies:
 bank project, 160
 Calgon, 163
 careless comment, 103
 Federal Reserve, 3
 heft *vs.* gravitas, 81–82
 Hewlett-Packard, 55
 hospital CEO, 174
 insurance merger, 71
 International Paper, 42
 Merck, 183
 Navy, 136
 purchasing problem, 100
 timing, 177
USA Today, 143
- Charts, 82–83
- Check cycles, problems related to, 113
- Checks, issuing, 113
- Client defections, 108
- Client requests/requirements, adjusting
 proposals in view of, 179
- Clout, 46
- Collaboration with client, value of, 15
- Colleagues of buyer, meeting, 183
- Collins, Jim, 136
- Commercially published books:
 advantages of, 137
 “instant trust” and, 24–25
 retainers and, 164
- Commitment relationship, fees and, 180
- Committee review, budget approval and, 101
- Committees, avoiding, 21
- Competitive moves, 132
- Competitive requirements, sole source
 providers and exemption from, 136
- Compromise, effective and ineffective,
 125–129
- Conceptual agreement(s), 1, 17, 37, 54, 68,
 78, 117, 172
 concluding in person, 79
 in consulting business model, 74
 defined, 4, 6
 definitive dates/times and, 93
 distilling, RFPs and, 145
 establishing, 94
 gaining on objectives, metrics, and
 value, 179
 proposals as summations of, 1, 11
 questioning buyer about obstacles to,
 103–104
 reconfirming, 94
 role of, 12–14
 in simple business sequence, 130
 summarizing of, proposal and, 2
 time management and, 53
 with true, economic buyer, 74
 trusting relationship with buyer and, 7
 value and, 33
- Confidentiality documents, 67
- Conflict resolution, 126
- Consensus, creating, 184
- “Consultant-up”:
 signature and, 113
 steps for, 51
- Consulting business model, 74
- Consulting retainers, 153
- Content, highest possible, securing, 181

- Contingencies, legal departments and, 115, 116
- Contingent action, avoiding delegation and, 52
- Contract work, attorneys adept in, 123
- Copies of proposal, execution of, 111
- Coping strategies, 100–104
- Copyrighted proposals, 91
- Copyrights, 138
- Cover letters:
defined, 83
sample, 83–84
- Credibility:
instant, methods for, 25–26
when gatekeeper won't introduce to buyer and, 46
- Credit cards:
fees related to, 100
providing payment directions for, 113
- Crowds, proposal presentation and, 89–90
- Customers, RFPs and surveys of, 142
- Deadlines:
meeting, 67
public meetings, RFPs and, 148
- Deaths, 108, 132
- Defeat, handling and learning from, 175–178
- Defensiveness, avoiding, 176
- Delays, time and money, handling, 171–175
- Delegation, avoiding, 50–53
- Deliverables, 82
- Deloitte, 16
- Deposits, 111
acceptance of proposal and, 72
clearing, 113
terms and conditions in successful proposals and, 70
- Disability, 105
- Discounts:
client's rationale for advance payment and, 183
evaluating, 182
- Discretionary time, maximizing, 15
- Disengagement date, 65
- Divestitures, 105
- Documentation, *pro bono* work and, 186
- Downsizing, 6, 129
- Duplicative work, avoiding, 18
- Duration and timing, in sample retainer proposal, 167
- Economic buyer(s), 9, 18, 23
accountabilities and roles accepted by, 54
avoiding delegation and, 50–53
bespoke RFPs and, 141
defined, 4
delays and, 171, 172
determining, 19–22
developing trusting relationships with, 6–7, 18
direct relationships with, 12
follow up and, 87, 179
guile and the art of meeting, 43–49
hard-copy personal note to, example, 49
meeting, 139
questions related to, 30
quickly getting proposal in front of, 179
real power of, 47
RFP situations and relationship with, 132–140
size of organization and number of, 21
stressing your importance to, 175
talking only to, 178
true, meeting solely with, 160
when gatekeeper won't introduce you to, 46
- Education, RFP design and, 140
- Ego control, retainer and, 163
- Electronic invoices, 111
- Electronic proposals, 79
- Elevator pitches, avoiding, 25
- E-mail, monthly “boosters” via, 142
- Emergencies, 108
- Emotional gains, overcoming legitimate obstacles and, 110
- Employees, RFPs and surveys of, 142
- Equitable compensation, 17
- Errors:
on projections, 109
proof of, 117
- Ethics, when gatekeeper won't introduce you to buyer, 46
- Excitement, 78
- Excuses, overcoming, 172–173
- Executive councils, 102
- Executive speech, business acumen and, 53
- Executive summary, 145
- Expense policy, terms/conditions in successful proposals and, 70

- Expense reimbursement:
 proposals and stipulation of, 2
 RFPs and delay in, 152
 terms and conditions in successful proposals
 and, 69
- Expenses, proposal presentation and, 92
- Family problems, 173
- FAR (Federal Acquisitions Regulation) Act, 136
- Fear:
 illegitimate, last-minute objections and, 107
 of losing business, 52
 when gatekeeper won't introduce you to
 buyer and, 46
- Feasibility buyers, 11
- Federal ID number, 111
- Federal Reserve Banks, case studies, 3, 125
- FedEx:
 following up and, 98
 letter envelope, 111, 113
 proposals and, 80, 84
- Fees, 37. *See also* Billing; Payment
 based on value, 15–16
 coaching buyer in regard to, 103
 commitment relationship and, 180
 continual examining of, 184
 credit card, 100
 legal department and, 118
 lowering, avoiding, 105
 maximizing, 181–185
 preserving integrity of, 127–128
 proposals and stipulation of, 2
 retainer renewals and, 161
 standard language related to, 17
 terms and conditions in successful proposals
 and, 68, 69
 value-based, 17
- Firings, 105
- First-place prizes, 175
- Flexibility, retainer and, 162
- Focus groups, 104
- Following up, timing for, 97–100
- Foreign banks, 99
- “Free consulting,” 177
- Full fees, evaluating, 182
- Gaining influence, 184
- Gatekeepers:
 avoiding/circumventing, 19, 39, 47, 54
 “blowing up,” 47–50
 defined, 4
 mutual, enlightened self-interest and, 40,
 41–43
 sizing up, 41
- Gifts, 83
- Gittomer, Jeff, 165
- Golden handshake, 129–133
 enforcing, 131
 options provided and, 132
- Goldsmith, Marshall, 165
- Good to Great* (Collins), 136
- Graphs, 82–83
- Guile:
 failure of, 46
 using, 43–49
- Hammer, Michael, 136
- Henry VI* (Shakespeare), 115
- Hesitancy, continuing, 103
- Hewlett-Packard:
 case study, 55
 undocumented promises and, 158–159
- High-quality leads, 178
- High rates, 100–101
 legitimate obstacles and, 108
 raising, 187
- Hospital CEO case study, 174
- Human resources, 21
 avoiding delegation and, 50, 51
 fee basis and, 117
- Ignorance, when gatekeeper won't introduce
 you to buyer and, 46
- Illegitimate fears, last-minute objections
 and, 107
- Illnesses, 108, 173
- Impact, establishing, 33–37
- Implementation:
 in consulting business model, 74
 in simple business sequence, 130
- Incentives, 83
- Inclusion, additional options and, 184
- Incorporation, proof of, 117
- Industry experience, RFP design and, 140
- Influence, gaining, 184
- Initial payments, RFPs and delay in, 152
- In-progress payments, RFPs and delay
 in, 152

- Inputs, 7
- Instant credibility, methods for, 25–26
- Instantiate, 78
- “Instant trust,” generating, 24
- Insurance merger case study, 71
- Intangible benefits, 18, 35, 36
- Intellectual property, 11, 67, 78, 124
 - developing, advantages of, 137
 - retainers and, 164
 - sole source providers and, 136–137
 - well-known, “instant trust” and, 25
- Interest charges:
 - on credit card payments, 113
 - penalty clauses and, 120
- Intermezzo, proposal presentation and, 89
- Internal Revenue Service, 116
- International experience, RFP design
 - and, 140
- International Paper, case study, 42
- Intervening events, legitimate, last-minute
 - objections and, 105–106
- Invoice and statement, 111, 112
- Invoicing, terms/conditions in successful
 - proposals and, 69
- IP. *See* Intellectual property
- Jackson, Randy, 85
- Joint accountabilities:
 - identifying, 184
 - in sample retainer proposal, 168
 - in successful proposals, 66–68
- Key influencers, identifying, 54–55
- Key recommenders, 11, 22
- Kidnappings, 105
- Labor intensity, accelerant curve and increase
 - in, 165
- Language:
 - avoid dumbing down with, 26
 - RFP design and, 140
- Last-minute objections:
 - genuine misunderstandings and, 104–105
 - illegitimate fears and, 107
 - legitimate, 102, 105–106
 - overcoming, 104–107
 - resistance encountered from others and,
 - 106–107
- Lateral marketing, 184
- Lawyers:
 - billing by, 16
 - buyers and, 116
 - fee basis and, 117
- Leadership, thermal zone and, 56
- Leads, high-quality, 178
- Legal department:
 - adjusting proposals in view of, 179
 - avoiding, 118–122, 132
 - best practices and, 118
 - dealing with, 115–118
 - involving, 116
 - keeping proposals out of, 102
- Legal retainers, consulting retainers *vs.*, 153
- Legitimate obstacles, overcoming, 108–111
- Liability insurance, 117
- Licensing, 165
- Listening, staying in the moment and, 53
- Low self-esteem, reconciling, 52
- Mailing lists, 177
- Malpractice insurance, 99, 147–148
- Management, RFPs and surveys of, 142
- Manual checks, drawing, 113
- Market gravity:
 - bespoke RFPs and, 140
 - role of, 139
- Marketing:
 - lateral, 184
 - while delivering a project, 182
- Market plunges, 132
- McKinsey, 16
- Measures, identifying, 184
- Media interviews, 25
- Mentor Program, 25, 100–101
- Merck, 40
 - buyer relationships at, 22
 - case study, 183
- Methodology, avoiding love affair with, 52–53
- Methodology and options, in successful
 - proposals, 63–65
- Metrics:
 - conceptual agreement on, 14
 - defined, 6, 30
 - differentiating between objectives, values
 - and, 37
 - examples, 7–8
 - framing with buyer, 7
 - gaining conceptual agreement on, 179

- for progress and success, establishing, 30–33
 - in successful proposals, 60–61
- Middle managers, key, gaining commitment of, 56
- Mistakes, learning from, 178
- Misunderstandings, genuine, last-minute objections and, 104–105
- Money:
 - delays based on, handling, 171–175
 - leaving on the table, 180
 - objections tied to, 12–13
 - as priority issue, not as resource issue, 18
 - unrecoverable, 186
- Mossberg, Walt, 165
- “Must” personal objectives:
 - characteristics of, 126
 - defined, 127
 - protecting, 132
- Mutual, enlightened self-interest:
 - best and worst practices, 41*t*
 - everybody wins with, 40
 - failure of, 46
 - when gatekeeper is not introducing you to buyer, 46
- Natural disasters, 132
- Navy case study, 136
- Need, creating, 13
- Negotiation:
 - “musts” and “wants” relative to, 126
 - proposal presentation and, 90
- Networking, with public meeting attendees, 147
- Newsletters:
 - articles in, retainers and, 166
 - lists, 177
 - monthly “boosters” via, 142
- Nonbuyers, avoiding relationships with, 21
- Noncompete agreements, premium charges and, 123
- Nondisclosure agreements, 123
- Nondisclosure documents, 67
- Nondisclosure forms, 117
- Nondomestic firms, billing, 111
- Objections:
 - handling, 179
 - last-minute, overcoming, 104–107
- Objectives:
 - of buyer, 44
 - conceptual agreement on, 14, 179
 - defined, 6, 29, 127
 - differentiating between metrics, value and, 37
 - examples, 7
 - framing with buyer, 7
 - identifying, 184
 - maximizing number of, in proposal, 110
 - outcome-based, establishing, 27–30
 - in successful proposals, 59–60
 - true, economic buyer and, 74
 - value-based fees and, 17
- Obstacles:
 - ascertaining, 179
 - legitimate, handling, 172
- Occupations, defined, 150
- Omission insurance, 117
- Options:
 - across range of business/personal issues, 184
 - business escalation with, 89
 - selecting, assessment of, 182
- Outcome-based business objectives, establishing, 27–30
- Outputs, 7
- Outsourcing, 129
- Overseas firms, wiring funds and, 99
- Parachute business, retainers, accelerant curve and, 164, 165
- Partnership, when gatekeeper won’t introduce you to buyer and, 46
- Passion, market viability and, 150
- Payment. *See also* Billing; Fees
 - advance, self-interest of client and, 183
 - expediting, 114
 - RFPs and delay in, 152
 - stipulating terms of, 2
 - terms/conditions in successful proposals and, 68, 69
- Payment upon completion, never agree to, 128
- Penalty clauses, avoiding, 120
- People involved, in sample retainer proposal, 166
- Performance, guaranteeing standard of, 121
- Peripheral benefits, 18, 35

- Personal acceptance:
 in consulting business model, 74
 in simple business sequence, 130
- Personal objectives:
 behind business objectives, 17–18
 categories of, 126–127
- Personal services firms, attorneys adept in
 workings of, 123
- Persuasion, 126
- Pitch, avoiding, 25, 51
- Platinum reference, “instant trust” and, 24
- Postproject testing, requests for proposals
 and, 143
- “Pouring cement on the sale,” 114, 131, 179
- Precedent, when gatekeeper won’t introduce
 you to buyer and, 46
- Preparation work, RFPs and, 142
- Prescription, retainers and, 163
- Preventive action, avoiding delegation and, 52
- Pricing, 15. *See also* Billing; Fees; Payment
- Pro bono* work, creating proposals for, 186
- Production, proposal presentation and, 90
- Professional credentials, RFP design and, 140
- Profits, potential value and, 34
- Progress, metrics established for, 30–33
- Projections, errors on, 109
- Project objectives, proposals and stipulation
 of, 2
- Project work, retainers and, 169–170
- Promotional materials, 82
- Proposal package:
 what not to include in, 82–83
 what to include in, 83–85
- Proposal presentation, 77–96
 accurate re-creations in, 81–85
 definitive dates and times for, 93–96
 golden rules for, 80, 85, 92, 96
 no pitch or promotion with, 85–89
 not being there for, 89–92
 optimal choices and, 86–88
 proper sequence for, 79–80
 speed and responsiveness in, 77–81
- Proposal prevention, preventive and
 contingent actions, 95–96
- Proposals, 57–75
 acceptance of, 71–75
 assessing repeat business from, 182
 attorney consultants and, 123–125
 in business model, 5–9
 continual improvement in, 178–181
 copyrighted, 91
 defined, 1
 delays after submission of, 172
 electronic, 79
 follow-up for, 103
 getting signature on bottom line of, 111
 good-faith agreement tied to, 186
 joint accountabilities and, 66–68
 making as continuation of conversation,
 119
 methodical, saving time and money with,
 186–187
 methodology and options for, 63–65
 metrics and, 60–61
 objectives and, 59–63
 with options or increasing value and
 fee, 179
 for *pro bono* work, 186
 questions and checkpoints for, 55–56
 situation appraisal and, 57–58
 size of, 186
 as summations of conceptual agreements,
 1, 11
 terms and conditions in, 68–71
 times to stop writing certain kinds of,
 185–187
 timing of, 65–66
 twelve steps to acceptance of, 178–179
 ultimate fees, basis of, 35
 value and, 61–63
 what they can do, 2
 what they cannot do, 2–4
 in the wrong hands, 9–12
- Provocative questions, asking, 25–26
- Public meetings:
 bidding techniques and, 147–148
 choosing which ones to attend, 148–149
 information learned at, 146–147
 locations of, 146
 networking with other attendees at, 147
 used for leverage, RFPs and, 145–149
- Publishing credits, RFP design and, 140
- Purchasing problem case study, 100
- Quasi-consulting work, avoiding, 52
- Questions, proposal presentation and, 90
- Quid pro quo* concessions, fee adjustments
 and, 127–128

- Reciprocal value, fee, commitment relationship and, 180
- Re-creations, accurate, 81–85
- Reengineering* (Hammer), 136
- References, *pro bono* work and, 186
- Referrals:
- asking for, 177–178
 - for future, proposals and, 8
- Registration, 138
- Reimbursements, terms/conditions in successful proposals and, 68, 69
- Reinforcement tools, RFPs and, 142
- Rejection:
- accepting, 39
 - finding reasons for, 181
 - handling, 175–178
- Relationships. *See also* Trusting relationships
- in consulting business model, 74
 - extending, 177–178
 - in simple business sequence, 130
- Repeat business, assessing, 182
- Requests for proposals, 28
- accompanying with your own proposal, 186
 - additional value added for, 142–145
 - adjusting proposals in view of, 179
 - avoiding, 28, 36
 - buyers and design of, 140
 - circumventing, 136, 138
 - labor intensity related to, 151–152
 - making them into bespoke offerings, 139–142
 - Navy case study, 136
 - preventive approach to, 141
 - public meetings used for leverage and, 145–149
 - role of, 135
 - scope creep and, 151
 - state governments and, 138
 - USA Today* case study, 143
- Resistance:
- case study in, 55
 - last-minute objections and, 106–107
- Responsiveness:
- proposals and, 77–81
 - retainers and, 162
- Results:
- in consulting business model, 74
 - in simple business sequence, 130
- Resumes, 82
- Retainer option, evaluating choices around, 182
- Retainer relationship, elements of, 155–157
- Retainers, 16
- accelerant curve and, 164
 - adjusting proposals in view of, 179
 - controlling scope creep/scope seep, 157–159
 - defined, 154
 - postponements and, 169
 - project work and, 169–170
 - renewing, 160–164
 - sample proposal, 166–168
 - scope of, 155–156
 - stimulating more, 164–166, 169–170
 - time window for, 154, 156, 160
 - variables of, 153–157
 - when to stop writing, 185
- Return on investment, 18, 34, 37, 90, 185
- additional value in RFPs and, 142
 - delays and, 173
 - handling errors and, 110
 - impressive, demonstrating, 179
 - objectives in successful proposals and, 59
 - proposal and, 2
 - terms/conditions in successful proposals and, 68
 - trust and, 92
 - value in successful proposals and, 61
- Returns, proposal presentation and, 91
- RFPs. *See* Requests for proposals
- Rightsizing, 6
- ROI. *See* Return on investment
- Runyon, Damon, 48
- Savings, annualized, 34
- Scope, in sample retainer proposal, 167
- Scope creep, 65, 129, 151
- controlling, 157–159
 - defining, 157
 - pro bono* work and, 186
- Scope seep:
- controlling, 157–159
 - defining, 157
- Secretary to buyer, cultivating relationship with, 98
- “Sedulous next steps,” 93, 94, 95
- Self-interest of client, advance payments and, 183. *See also* Mutual, enlightened self-interest

- Senior committees, 102
- Service marks, 138
- Setbacks, 173
- Shakespeare, William, 115
- Shared values:
- business model and, 5–6
 - consulting business model and, 74
 - simple business sequence and, 130
- Signatory provisions, in successful proposals, 71, 72
- Signature, creating, 111, 113–114
- Signed documents, preference for, 73
- Situation appraisals:
- poor, example of, 58
 - in sample retainer proposals, 166
 - in successful proposals, 57–58
- SNS. *See* “Sedulous next steps”
- Sole-source material, hiring and delivery of results process, 137
- Sole-source providing, advantages of, 135–138
- Speed:
- proposals and, 77–81, 93, 102
 - when gatekeeper won’t introduce you to buyer and, 46
- Standard of performance, guaranteeing, 121
- Star status, retainer business and, 165
- State governments, RFPs and, 138
- Statement. *See* Invoice and statement
- Strohmer, Art, 40
- Success:
- likely best places for, 55
 - manifesting, 26
 - maximizing, 181–183
 - measures of, 74
 - metrics established for, 30–33
 - positioning self as peer, partner, and trusted advisor for, 130
 - in small amounts, 175
- Success ratio, 179
- Summary, conceptual agreement and, 79
- Superiors, no relationship or credibility with, 109
- Suppliers, evaluating, RFPs and, 136, 142
- Support, ensuring, 54–56
- Surveys, RFPs and, 142
- SWIFT number, 99
- Tangible benefits, 18, 35
- Teamwork, better, 18
- Technology crashes, 105
- “Telephone handshake,” 73, 114
- Temperature, proposal presentation and, 89
- Terminations, 132
- Terms and conditions:
- negotiating and compromising on, 128–129, 132
 - in sample retainer proposals, 167
 - in successful proposals, 68–71
- Testimonials, *pro bono* work and, 186
- Thermal zone, 56
- Thought leadership, retainers and, 164
- Time-based billing, 16
- Time management, 53
- Time/timing:
- case study, 177
 - compromise on, care with, 128–129
 - delays based on, handling, 171–175
 - as priority, 13
 - proposal presentation and, 89
 - successful proposals and, 65–66
- Trademarks, 67, 138
- Transfers, 186
- Trust:
- conceptual agreement based on, 13–14
 - preventive and contingent actions and, 95–96
 - proposal presentation and, 91
- Trusting relationships, 12, 54, 186
- acceptance of proposal and, 72
 - bespoke RFPs and, 141
 - buyer nonresponse and, 95
 - defined, 6, 23, 24
 - developing, 6–7, 18, 23–26, 36, 178
 - follow up and, 87
 - foregoing penalty clauses and, 120
 - golden handshake and, 129–132
 - grounding that comes with, 187
 - hallmarks of, 23
 - handling rejection and, 176–178
 - project objectives and, 29
 - proposal presentation and, 91
 - shared values about business and, 130
 - time management and, 53
- Uncontrollable events, 132
- Unreturned communications, general rule for, 98
- USA Today* case study, 143

- Vacancy in executive ranks, 108
- Validity, RFPs and testing assumptions of, 142
- Value-based fees, defined, 17
- Value-based proposals, acceptance rates for, 87
- Value distance, 14, 16
- Value(s), 78
 - of achieving objectives, 74
 - additional, RFPs and, 142–145
 - appropriate fees for, in any given option, 180
 - for buyer in retainers, 162–163
 - client concern with, 185
 - concept of, 14–18
 - conceptual agreement on, 14
 - defined, 6, 35
 - differentiating between metrics, objectives and, 37
 - establishing, 33–37
 - examples, 8–9
 - fees based on, 15–16
 - framing with buyer, 7
 - gaining conceptual agreement on, 179
 - identifying, 184
 - immediate, 51
 - offering from outset, 25
 - providing to clients, 187
 - in successful proposals, 61–63
 - three Ps of, 35
 - in your advice, not in your presence, 16
- Value statements:
 - generating, 34–35
 - maximizing from any one objective, 110
- Value system, common, business model and, 5–6
- Vault, retainers, accelerant curve and, 164, 165
- Visibility, retainers and, 164
- Visual aids, avoiding, 51
- “Want” personal objectives:
 - characteristics of, 127
 - defined, 127
 - trading away, 132
- Wardrobe, 26
- Wasted opportunity, fee, commitment relationship and, 186
- Wealth:
 - assuring continuance of, 187
 - maximizing discretionary time and, 15
- Websites, monthly “boosters” via, 142
- White papers, retainers and, 166
- Winning, 175
- Wire instructions, 111
- Wire transfers:
 - bank charges and, 113
 - providing directions for, 113
- Wiring funds, overseas firms and, 99
- Work duplication, avoiding, 18
- Work product, legal review and, 124