# ATLANTA 2016

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# Proposal Preparedness

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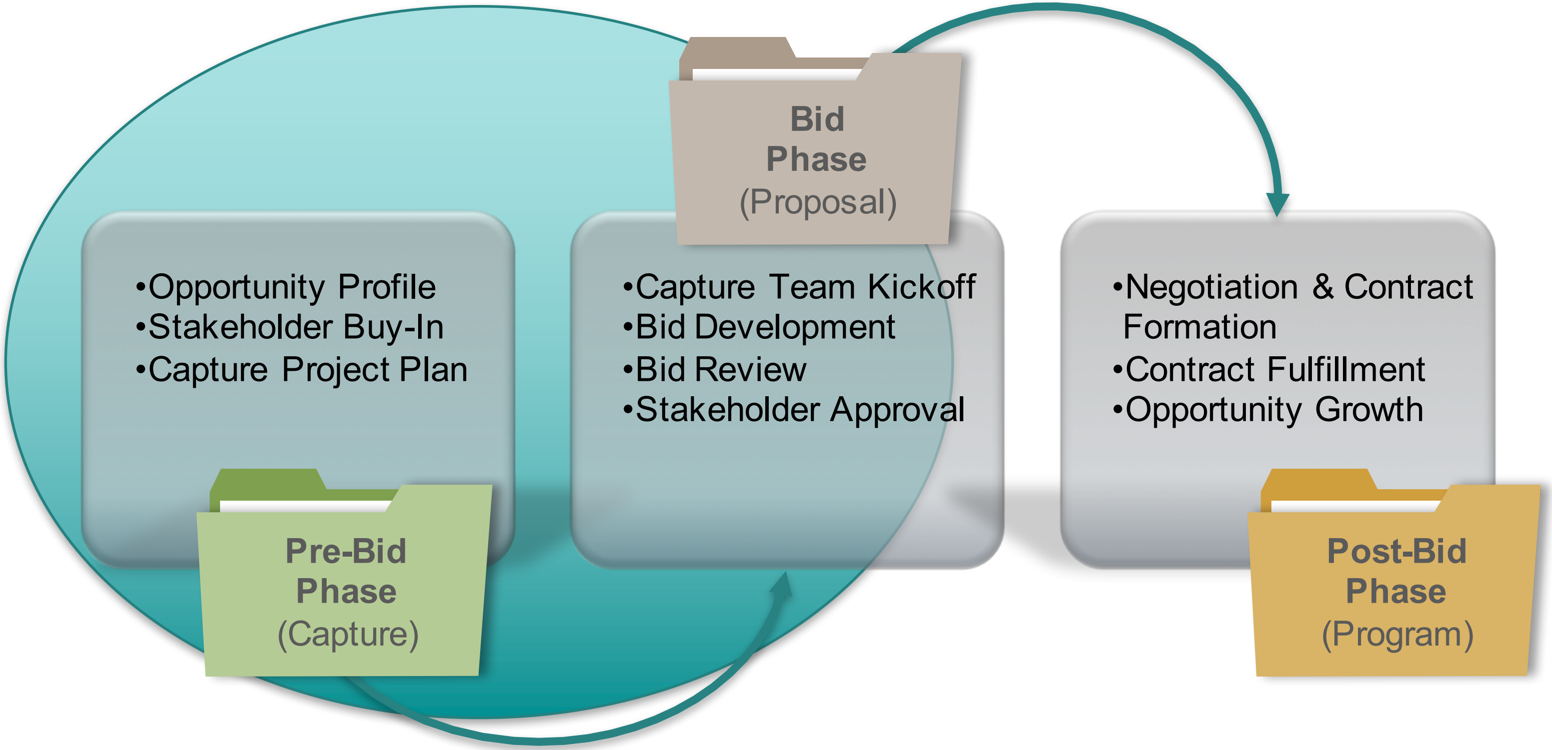
# Topics


- **Business Development Lifecycle**
- **Before the Solicitation Release**
- **People, Processes, and Tools → Focus on the process**
- **Shipley Capture and Proposal Timeline**
- **Preparedness Challenges**
- **Get Organized**
  - Understand the Requirements
  - Storyboard and Solution Approach
  - Extract Information from SMEs
  - Graphics
  - Leverage Team Members

# Business Development Lifecycle



# Before the Solicitation Release

**Business Activities:**

- Collect the competitive intelligence to win
- Continue to grow customer relationship
- Lay the foundation for teaming, if necessary

**Proposal Activities:**

- Assign and secure resources to fulfill various proposal roles
- Develop technical, management, and pricing win strategies for your company
- Prepare to start of the proposal with draft RFP documents, if available
- Track your progress towards final RFP release

# Right People, Processes, and Tools

Executive Leadership, Business Development Managers, Capture Managers, Proposal Managers, Program Managers, Consultants, SMEs

Pre-bid (BD and Capture)
Bid Gate Reviews
Bid (Proposal)
Post-bid (Program/Project)

EZGovOpps, GovWin, Bloomberg Government, FPDS, Privia, SharePoint, Checklists, Score Sheets

*"Surround yourself with the best people you can find, delegate authority, and don't interfere."* – Ronald Reagan

# Right People

- ✓ Prior to the proposal, “train” the proposal team
- ✓ Clearly define roles and responsibilities of the proposal team
- ✓ Set expectations for each person’s support
- ✓ Communicate timelines and schedules often
- ✓ Make sure current and future work schedules allow for the extra support required during a proposal response
- ✓ Determine any skills gaps and decide on strategic hires or outsource the role to a consultant
- ✓ Secure the right Subject Matter Expert and pricing expert

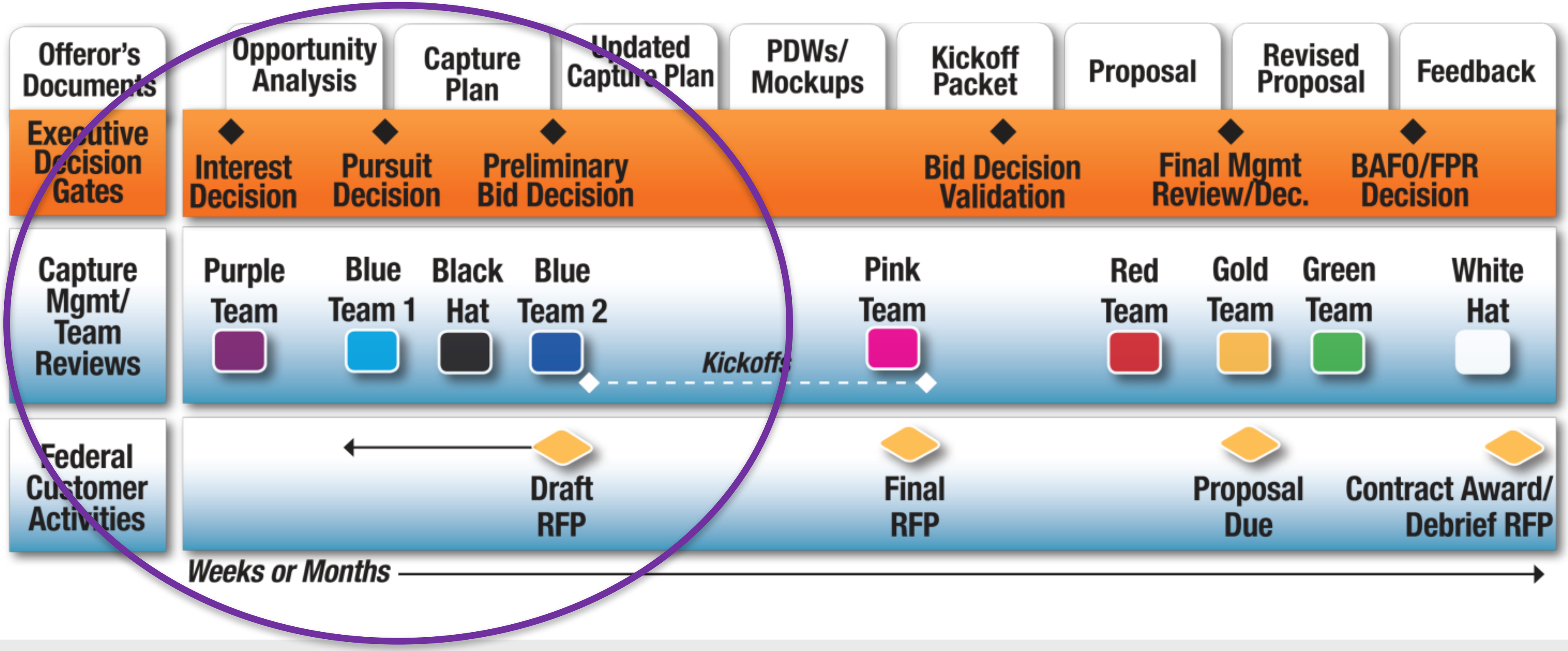
# Focus on Process

- ✓ Develop a repeatable and scalable processes tailored to your company
- ✓ Set up, develop, and properly maintain your knowledge management system and process
- ✓ Develop and document proposal management and development artifacts (e.g., schedule, question, compliance matrix templates)
- ✓ Consolidate and update graphics, past performances, boilerplate, and reuse materials
- ✓ Conduct stand up, kick off, and debrief meetings / calls
- ✓ Develop standard color team review processes
- ✓ Pause to collect lessons learned and debrief your team after each capture and proposal effort

# Right Tool and Technology

- ✓ Use tools that complement your company culture and staff needs
- ✓ Set up management/coordination tool similar to Privia, Office 365, or SharePoint
  - Design document folders and system to mimic and facilitate a smooth workflow
  - Select a tool that allows automatic version control
- ✓ For geographically dispersed team, set up a reliable and inexpensive teleconferencing service (e.g., www.uberconference.com, www.join.me)

# Shipley Timeline Capture and Proposal Activities



# Proposal Preparedness Challenges


- Little or no understanding of the technical requirements
- Proposal are very labor intensive, expensive and tend to run over budget
- Proposal teams start too late and are usually in reactive mode
- SOW/PWS is either incomplete or inconsistent with Sections L & M
- Technical SMEs, Program Managers, and other staff are currently billable, over tasked, or don’t have proposal writing experience
- Proposal process is cumbersome and confusing
- Unclear Subcontractor experience, roles and responsibilities

# Get Organized

~~UN~~PREPARED

- **<u>Thoroughly</u> shred RFP and set up compliance matrix (CM) and outlines**
  - Take the time to thoroughly review and understand the RFP and requirements
  - Make time to collectively review these artifacts
- **Allocate the necessary resources and expertise**
  - Know when to hire consultants and outside experts
  - Use your billable SMEs appropriately (storyboards, color teams)
- **Storyboard & Solutioning**
  - Solidify the solution component before you write to include Pricing Staff
  - Develop win strategies and themes for the proposal
- **Identify the critical color team reviewers**
  - Engage the appropriate technical experts and project teams
  - Secure the right Executives and Functional Managers

# Understand the Requirements

- **Demonstrate understanding of the customer, mission, and goals of the contracts *EARLY* and *OFTEN* – the "so what factor"**
- **Don't parrot the RFP language – fine line between using key words and parroting the customer**
- **Use "anchor" graphic to show or communicate approach**
  - Should replace long and complicated narrative
  - Show the interconnectedness of multiple tasks ("the big picture")
- **Develop detail storyboards for each technical section to describe specific steps, processes, procedures, tools, etc. to address RFP requirements**

# Elements of a Storyboard


- **Administrative: Volume, Section #, page allocations, Date, POC, and SMEs**
- **RFP References (C, L, M, CDRLs, etc.)**
- **Theme Statement (overarching message, “Why Team ABC?”):** ***should claim something that is substantiated by the contents of this section***
- **Customer Hot Buttons:** ***Specific issues, concerns, likes, or dislikes of the customer***
- **Discriminators: two types**

  *1) Offensive, which is what we have that nobody else has, and 2) Defensive, which is what we have that we must present because the other guys are using it as their discriminator.*

# Elements of a Storyboard (continued)


- **Annotated Section Outline of Approach: outline against RFP sections**
- **Features/Innovations & Benefits of Approach/Solution:** ***For each feature/innovation, identify the corresponding benefits to the customer***
- **Experience/Success Stories:** ***Cite specific contracts, activities, accomplishments, metrics, awards, customer kudos, etc.***
- **Perceived Risks and Mitigation Strategy**
- **Graphics**

**Your Team Proposal**
**Volume # – Title**

| | | | |
|---|---|---|---|
| Section Number: | | Date: | |
| Volume Lead: | | Section Lead: | |
| Page Allocation: | | SME: | |

### RFP REFERENCES

| RFP Section | Requirement |
|---|---|
| | |
| | |
| | |

### CUSTOMER HOT BUTTONS

*Issues, concerns, likes, or dislikes of the customer **SPECIFIC** to this section.*

### THEME STATEMENT (optional)

*Provide the overarching message you want to get across to the customer in this section (Why Your Team in one sentence). The theme should claim something that is substantiated by the contents of this section.*

### ANNOTATED SECTION OUTLINE

*Categorize and organize the discussion into a detailed (annotated) outline against which this section will be written. Identify specific elements of our approach to satisfy the requirements. **Cite specific processes, tools, and organizational elements (who)**. The current outline is based on draft RFP requirements.*

EXAMPLE:
1.1 Section Title
- Clearly state key points that will later be expanded into paragraphs
  - Figure Y (attached – see graphics section of the storyboard)
- Key point
- Key point

### FEATURES AND BENEFITS OF OUR APPROACH/SOLUTION

*Identify specific features and innovations of our proposed approach/solution. For each feature/innovation, identify the corresponding benefits to the customer. How does our approach/solution provide faster, better, or cheaper results?*

| Feature/Innovation | Benefit to the CUSTOMER |
|---|---|
| EXAMPLE: Use of proven XYZ tool | EXAMPLE: Improved data accuracy and speed of file processing (quantify if possible) |
| | |
| | |

### DISCRIMINATORS

*Identify what Your Team has that is unique. Discriminators come in two types: 1) offensive, which is what we have that nobody else has, and 2) defensive, which is what we have that we must present because the other guys are using it as their discriminator.*

| Offensive | Defensive |
|---|---|
| | |
| | |

### EXPERIENCE (SUCCESS STORIES)

*Identify specific elements of our experience and past performance that will convince the customer that we can successfully execute our proposed approach. Cite specific contracts, activities, accomplishments, awards, customer kudos, etc.*




**Your Team Proposal**
**Volume # – Title**


| Contract | **Activities, accomplishments, awards, customer kudos, etc.** (for kudos, provide the name of individual being quoted, title, organization, and date) |
|---|---|
| | |
| | |
| | |

### PERCEIVED RISKS

*Identify any risks the customer may perceive with the execution of the proposed approach (we will decide later which will be discussed in the response). For each risk, define one or more actions that we will take to mitigate the risks.*

| Perceived Risk | Mitigation Strategy |
|---|---|
| | |
| | |
| | |

### GRAPHICS

*Provide a rough sketch, a photograph, or other graphic to support the material to be presented in this section. Provide a title and action caption for each graphic identified.*

# Extracting Technical Information and Approach from SMEs

- **Do this via interview, group session, or data call questionnaire**
- **Describe the specific steps, processes, procedure, etc. to achieve requirements**
  - Steps, phases, inputs, and outputs
  - Key performance indicators (KPI)
  - Detail methodology, framework, etc.
  - Deliverables, final product, etc.
- **List any dependencies among the tasks**
- **Detail the schedule and key milestones**
- **Project Risks & Mitigation strategies with success examples**
- **Basis of Estimates (BOE) – resources to perform work**
  - Analyze the functional requirements against the solution set
  - Discuss staffing level of effort based on the functional requirements

# Graphics


- Start each major section with a graphic
- Call Out Box designs should pop off the page
- Start early in the process and refine
- Image should complement or replace narrative
- Reuse graphics as a starting point to save time and resources IF they support your approach and win-themes
- Make graphics consistent (color scheme, font)
- Use action captures to describe the benefit or feature of your graphic

# Leverage Team Member Skills and Resources


- **Have NDA and TAs in place before proposal writing occurs**
- **Provide clear assignments and expectations – get buy in first**
- **Establish incremental milestones and reviews**
- **Leverage Teammate's experiences and resources**
  - May have specific expertise or customer insight
  - Help to minimize your B&P cost by using other outside resources from the team

# Key Takeaway


- Take the time to understand the client, requirements and your approach
- Develop a repeatable and scalable processes tailored to your company and opportunity size
- Develop and properly execute the right tools to develop your technical solution
- Use graphics to enhance the visual appeal and effectiveness of your proposal
- Pause to collect lessons learned and debrief your team after each proposal effort

# Session Evaluations

USDOE'16

## SPEAKER/SESSION EVALUATION

**Please place the completed evaluation into the evaluation box in the back of your session room or bring it to the registration desk.**

**SESSION TITLE:** ______________________

| **Please rate each of the following:** | **Poor** | | **Fair** | | **Great** |
|---|---|---|---|---|---|
| Overall Session Rating. | 1 | 2 | 3 | 4 | 5 |
| Session content matches the program description. | 1 | 2 | 3 | 4 | 5 |
| The speaker(s) appeared organized, informed, and delivered effective presentation. | 1 | 2 | 3 | 4 | 5 |
| Would you recommend that this/these speaker(s) return for future presentations? | ❑ Yes ❑ No | | | | |

**Turn over for additional questions*

## SPEAKER/SESSION EVALUATION

**Please place the completed evaluation into the evaluation box in the back of your session room or bring it to the registration desk.**

What topics most interested you in this session?

______________________

______________________

What topics do you feel were missing in this session?

______________________

______________________

Additional comments: ______________________

______________________

______________________

**Reminder**

Please complete the Speaker/Session Evaluation Form located in your program guide and place the form in the basket in the back of the room.

# Questions?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