



Proposal Strategies

Winning Proposal Characteristics

A winning proposal incorporates the following:

- Demonstrates clear understanding of the client's problems or situations
- Acceptable program, plan, or strategy to solve client's problem
- Documentation of your firm's qualifications
- Demonstrates firm's reliability and dependability
- Compelling and persuasive
- LOOKS like a winner!!!

Process of Elimination

- Proposals are not selected, they are eliminated
- Evaluators compare proposals
- Focus on creating a proposal that *cannot* be *eliminated*

The best proposal is the last one standing!

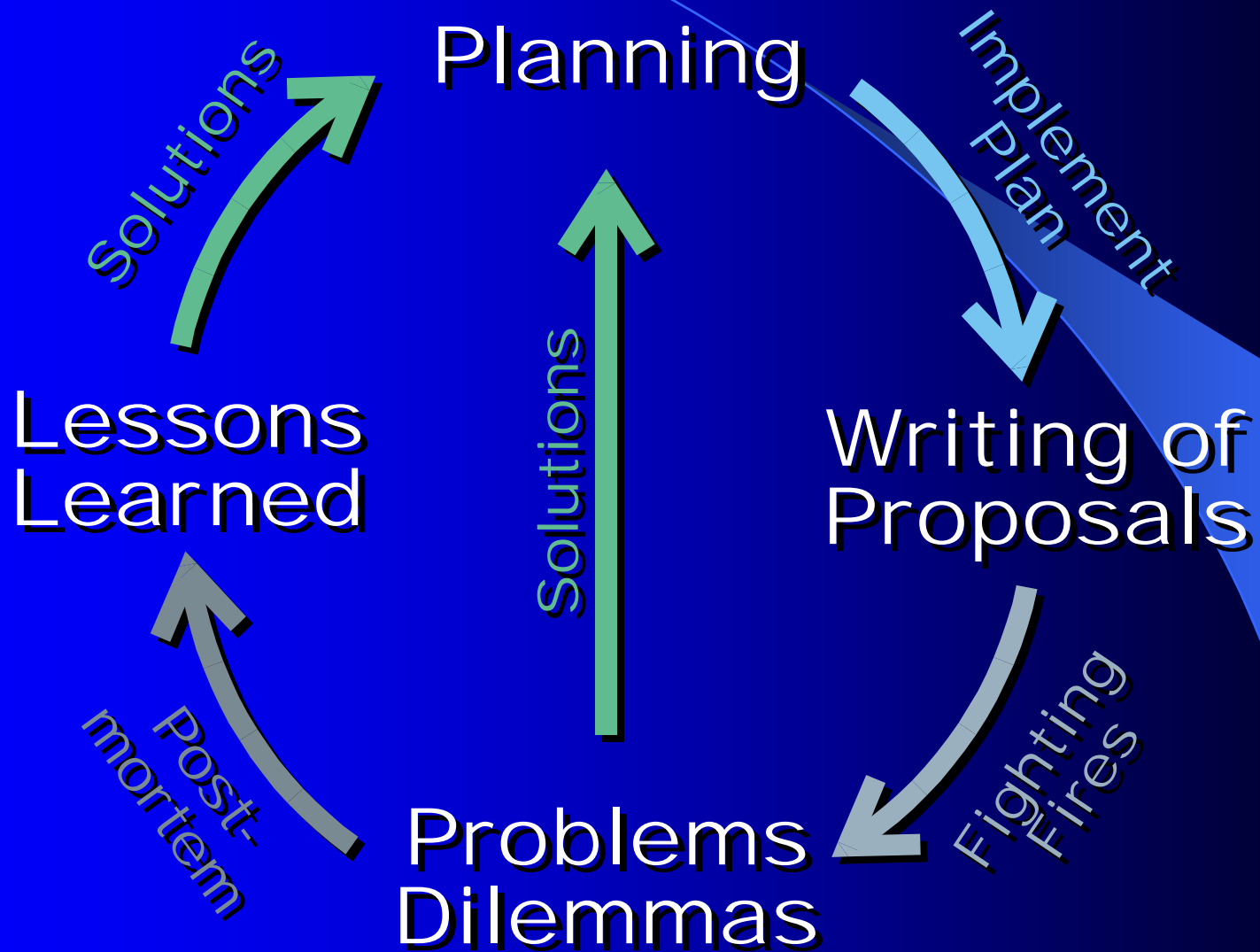
Proposal Strategies

A typical scenario goes like this:

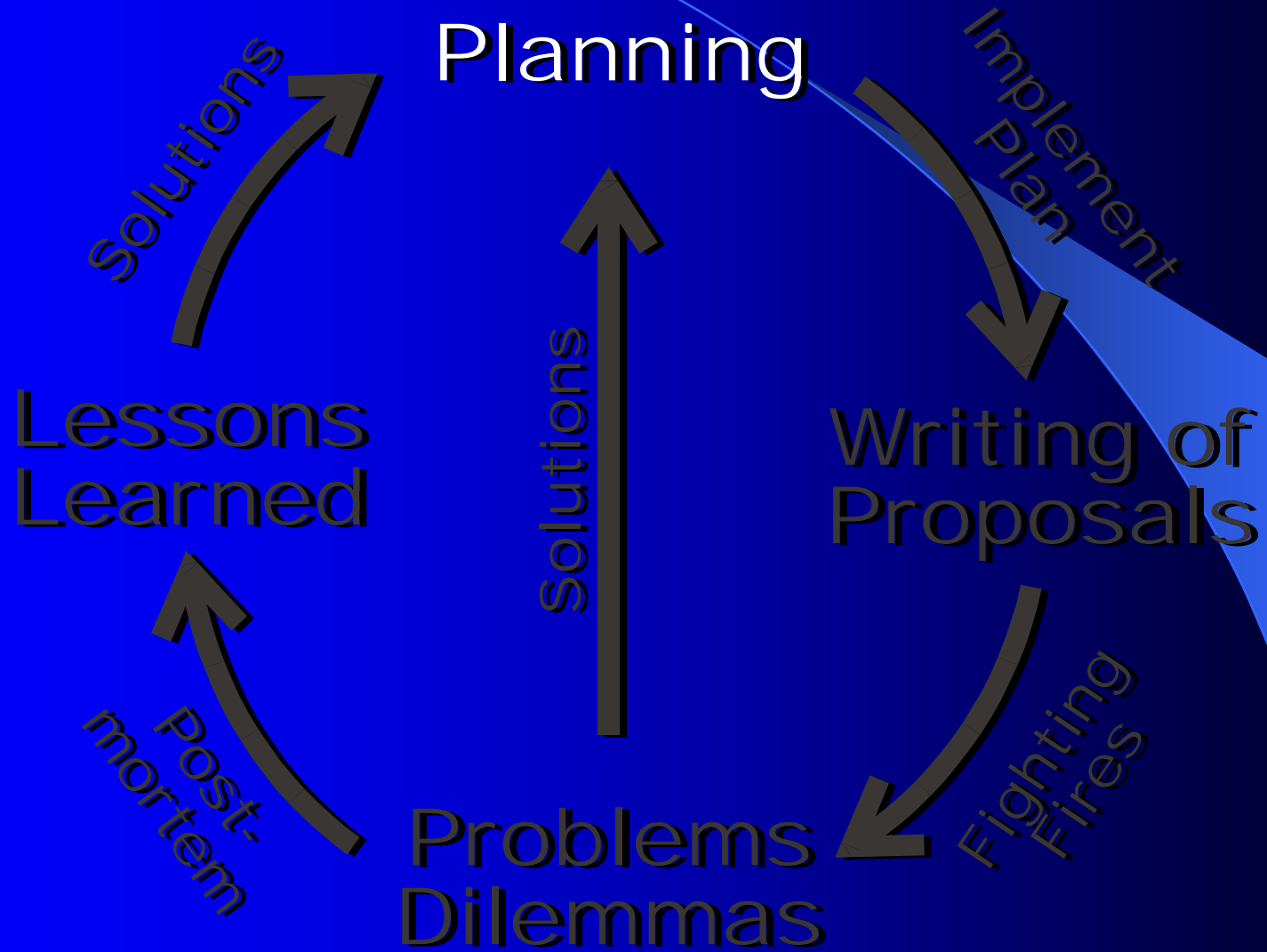
- **Weeks 1 & 2: little is done**
- **Week 3: activity is heating up**
- **Week 4: full PANIC mode!**

Trying to prepare a proposal in too short a time often produces symptoms of hurry: bad editing, clumsy writing, poor proofreading, inconsistencies, and errors.

Learning Cycle



Learning Cycle



Kickoff Meeting

Proposal Manager = “Cheerful Dictator”

- **Set up the production schedule**
- **Handles requests for clarifications**
- **Keep the Table of Contents updated**
- **Keep the mock book updated**
- **Compile the responsibility matrix**
- **Coordinate the printing of "early" materials, such as tabs, inserts, and resumes**

Kickoff Meeting

Proposal team members to include at the Kickoff Meeting:

- **Proposal Manager**
- **Coordinators (Team Leaders)**
- **Team Members**
 - **Technical matter experts**
 - **Business manager/client liaison**
 - **Writers**
 - **Production and graphics representatives**

Kickoff Meeting

The level of detail reached at the Kickoff Meeting is inversely proportional to the length of time available to complete the proposal!

“Shotgun” proposals with short lead times require a high level of detailed decision up front at the Kickoff Meeting.

- **What is the writing, production, delivery schedule?**
- **What format and design will the proposal take?**
- **What is the substance of your offer?**

Kickoff Meeting

Proposals with longer lead times allow for Kickoff Meetings with more preliminary strategy planning and less up front details.

- **What is the writing, production, delivery schedule?**
- **What themes will you emphasize and weave throughout the proposal?**

The Cheerful Dictator implements and enforces decisions and schedules from the Kickoff Meeting through production, delivery, and postmortem evaluation.

Kickoff Meeting

Your planning starts with your previous lessons learned!

You do not need to reinvent the wheel every time you write a proposal.

Think about who was needed to solve the problems in the past. That's who needs to be at your Kickoff Meeting.

Writing Proposals

- For your rough draft:
 - Get your materials together
 - Find the best environment and time for you
 - Don't try to get it perfect the first time (it's called a "rough draft" for a reason)
- As you write your rough draft:
 - Decide how to order the parts of the section
 - Don't edit as you write
 - Don't stop, keep writing and get it all down
 - Work from your outline

Writing Proposals

- Do not endlessly recycle content
- Keep the sentences short (average 12-17 words)
- Give the client what they want and then some
- Go into detail about why your way is best
- Write text that the client wants to keep reading
- Graphics are understood faster than words and attract attention from the reader
- Minimize jargon as much as possible
 - Managers with no technical background often read proposals

Writing Proposals

- Use words with connotative value
- Write in the active voice
- Continuously improve your proposal process

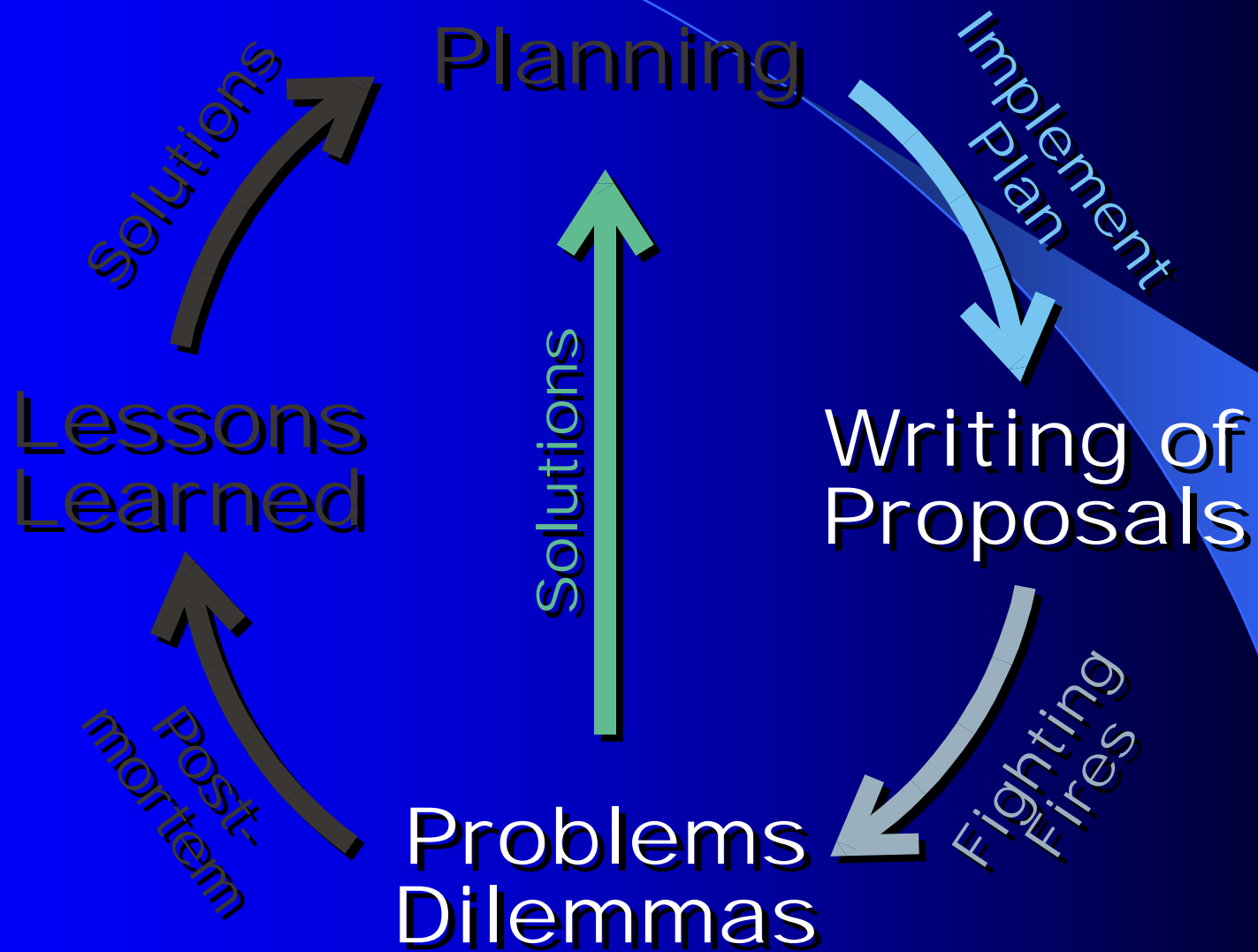
Use what you learn now to improve your proposal process!

Writing Proposals

Six words/phrases to avoid in your proposal:

Avoid	Use Instead
Best efforts	Reasonable efforts
Ensure	Will assist in
Guarantee	Will use reasonable effort to
Partner/Partnership	Ally, Alliance, Relationship
Will meet your needs/requirements	Our approach addresses your requirements
Joint/Jointly	Cooperative, Cooperatively

Learning Cycle





Dilemma #1: Mandatory Overtime



The Problem:

- Long days and late hours at the end of the proposal

What Can Be Done?

- Expect overtime
- Plan for it



Dilemma #1: Mandatory Overtime



The Problem:

- Long days and late hours at the end of the proposal

Alternative Solutions:

- Doubling staffing earlier in process and then breaking coverage into shifts at the end
 - Two editors work eight-hour days in the beginning
 - Two editors working overlapping eight-hour days to provide up to 16 hours of coverage daily



Dilemma #2: Inadequate Time and Budget

The Problem:

- Production is expected to perform “miracles”
- Unclear understanding of the function and level of work performed by production
- Last-minute changes to proposal content and format



Dilemma #2: Inadequate Time and Budget

What Can Be Done?

- **Kickoff Meeting**
 - Incorporate production representatives from the beginning to troubleshoot issues early in process
- **“Pens Down”**
 - Establish and enforce strict deadlines for the writers — all writers!

Dilemma #3: Inadequate Red Team Review Time

The Problem:

- Insufficient time to implement changes suggested by Red Team

Dilemma #3: Inadequate Red Team Review Time

What Can Be Done?

- Expect it
- Kickoff Meeting planning
 - Allocate 15% of your total proposal time to Red Team review and recovery
 - Allocate time for production to implement changes from Red Team
- Enforce “Pens Down” to prevent ad nauseam reviews and changes

Red Team should include experts from both technical and client perspectives.

Dilemma #4: Proposal Extensions

The Problem:

- Proposal extension generally cause more headaches and overtime than opportunity to improve the product

Dilemma #4: Proposal Extensions

What Can Be Done?

- Ignore the extensions and stick to the original schedule (unless there are significant changes to the RFP)
 - Extra time for polishing is good
 - Countless unnecessary revision are not good
- Take extra time to refine production issues or alleviate overtime
 - If given a week extension, declare a weekend “holiday” for your staff and only increase your internal schedule by two days

Capturing the Dilemma Lessons Learned

- Schedule extra staff from the beginning to alleviate overtime later
 - Plan for sufficient time to complete proposal production and support
 - Involve production beginning with the Kickoff Meeting
- Allocate enough time for Red Team review and recovery
- Pretend that proposal extensions DO NOT exist!

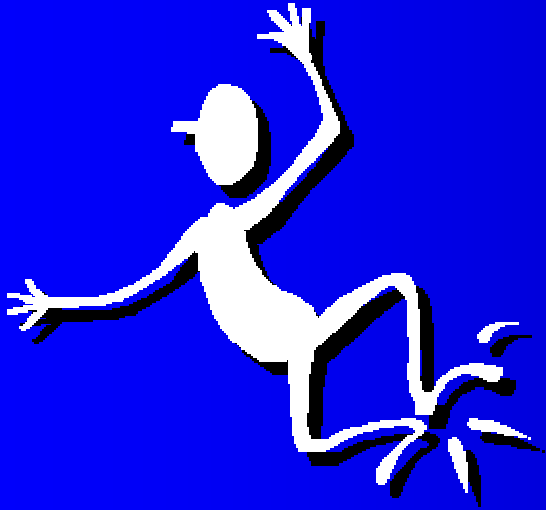
All dilemma lessons learned go into your file of information to use in planning your next proposal

Learning Cycle



Lessons Learned

Congratulations!



Proposal Complete!

**Immediate
Evaluation**

**After Client
Decision**

1. **Pop-up Evaluation**
2. **Proposal Body**
3. **Client Loss Debrief**
4. **Client Win Debrief**

Lessons Learned: Pop-up Evaluation

“Pop-up” issues are those dilemmas that you did NOT anticipate!

The key to preventing future pop-ups is to:

- Resolve WHY the pop-up occurred
- Plan ahead next time to prevent repeat problems

Put your conclusions in your Lessons Learned file!

Lessons Learned: Pop-up Evaluation

Pop-up evaluation questions can include:

- What were the causes leading up to the pop-up?
- Could any of these have been avoided?
- In what ways could improved planning reduce the risk of this pop-up happening again?
- What improvements can be made to the “emergency response system” to make the handling of future crises less traumatic?

Put your conclusions in your Lessons Learned file!

Lessons Learned: Proposal Body

Proposal content evaluation questions can include:

- Is the message clear?
- Does the proposal look good?
- Is the text readable, logical, and persuasive?
- Is the writing style consistent?
- Were graphics used effectively?
- Has anything been left out?

Put your conclusions in your Lessons Learned file!

Lessons Learned: Proposal Body

Proposal process evaluation questions can include:

- What level of pre-solicitation client contact did you have?
- Did you influence the solicitation in any way (scope of work, evaluation criteria, etc.)?
- Did you identify and inform internal staff who would work on the proposal before the solicitation arrived?

Put your conclusions in your Lessons Learned file!

Lessons Learned: Proposal Body

Questions continued:

- Did you conduct a win strategy session?
- Was the proposal development schedule reasonable and realistic?
- How effective was communication between team members and proposal management?
- What was the total cost of preparing the proposal?

Put your conclusions in your Lessons Learned file!

Lessons Learned: Proposal Body

Questions continued:

- How can the money you spent in creating the proposal be used more effectively?
- What worked really WELL during the process?
- What can you do overall to improve?

Invite members of the Red Team to evaluate the final product for responsiveness to their suggestions.

Put your conclusions in your Lessons Learned file!

Lessons Learned: Client Debrief

Ask for and attend a debrief with the client.

Who should attend the client debrief?

- **Proposal Manager**
- **Technical Experts**
- **Marketing Representatives**
- **Appropriate additional staff**

Put your conclusions in your Lessons Learned file!

Lessons Learned: Client Loss Debrief

Schedule and attend a client loss debrief!

Remember:

- **You are not there to complain or challenge the client's decision**
- **No one likes a whiner**

Keep questions specific to what YOU can improve. It will make you better, and it will demonstrate to the client your willingness to adapt to provide the services they need.

Put your conclusions in your Lessons Learned file!

Lessons Learned: Client Loss Debrief

Questions to ask during a client loss debrief session can include:

- Was the proposal responsive to their needs?
- Did the proposal meet all solicitation requirements?
- Did the proposal demonstrate understanding of the project?
- Were the technical and management approaches sufficient to handle the project?
- Were the costs too high?
- Was the proposal easy to read, understand, and follow?

Put your conclusions in your Lessons Learned file!

Lessons Learned: Client Win Debrief

Schedule and attend a client win debrief!

Remember:

- **Stay humble – because you won does not mean your proposal was perfect**
- **While flattery is nice, it is unproductive and will not help you improve your product**

Put your conclusions in your Lessons Learned file!

Lessons Learned: Client Win Debrief

- Questions to ask during a client win debrief session will vary depending on the proposal.
- Ask questions targeted specifically to determine if what you were trying to communicate in the proposal came through clearly.
- Share the information with your team!

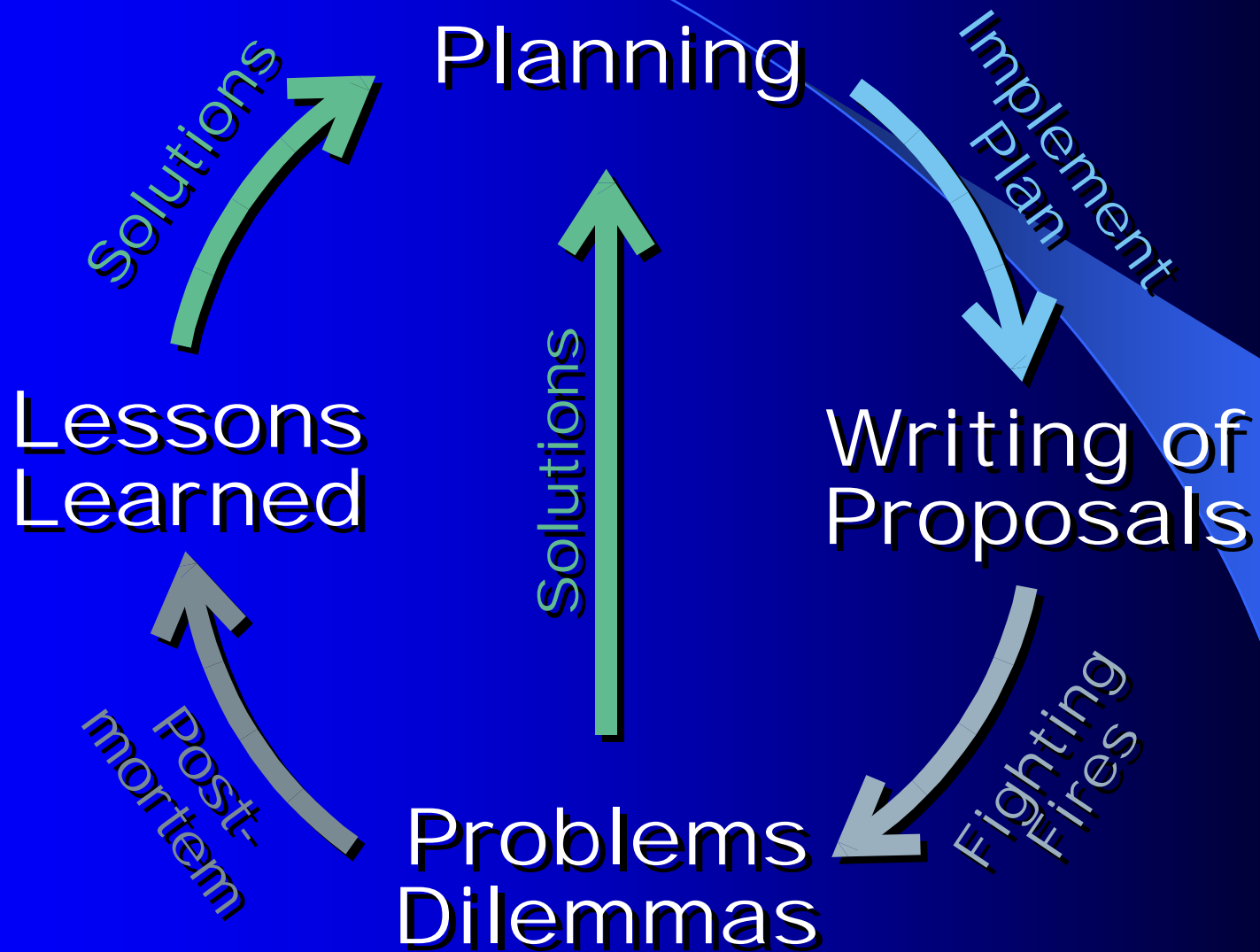
Put your conclusions in your Lessons Learned file!

Lessons Learned: Client Debrief

Performing debriefs after wins and losses will help staff be more receptive, as will sharing congratulations for work done well together with constructive criticism for improvement.

Put your conclusions in your Lessons Learned file!

Learning Cycle



Proposal Strategies

A typical scenario NOW goes like this:

- Extensive planning is performed immediately
- Activity is increased incrementally and consistently
- Problems are identified and quickly addressed
- Red Team reviews are anticipated, planned for, and suggestions incorporated
- Final proposal is ready, reviewed, and printed **BEFORE** the delivery date

Everything is delivered on time, edited, and formatted to specifications with less stress, better planning, and fewer overtime hours.

Proposal Strategies

Planning is the key!

