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Lessons Worth Learning – Post-Submittal Activities that Improve Competitive Results

Presented by
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to
APMP SoCal Chapter Conference, 21 October 2011

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Key Questions

❑ **Are there specific, best practices that you can use to continue advancing your proposals after submittal?**

❑ **What can you do to assure low-risk transition to contract delivery?**

❑ **How can you leverage "lessons learned" from your proposals to continuously improve your proposal capability?**

**Special Thanks to the Panel of Experts –
You Know Who You Are!**

Agenda

❑ **A Question of Priorities**

➢ What is the relative importance of the post-submittal phase?

❑ **Continuing the Competition**

➢ Are there specific, best practices that you can use to continue advancing your proposals after submittal?

❑ **Preparing to Perform**

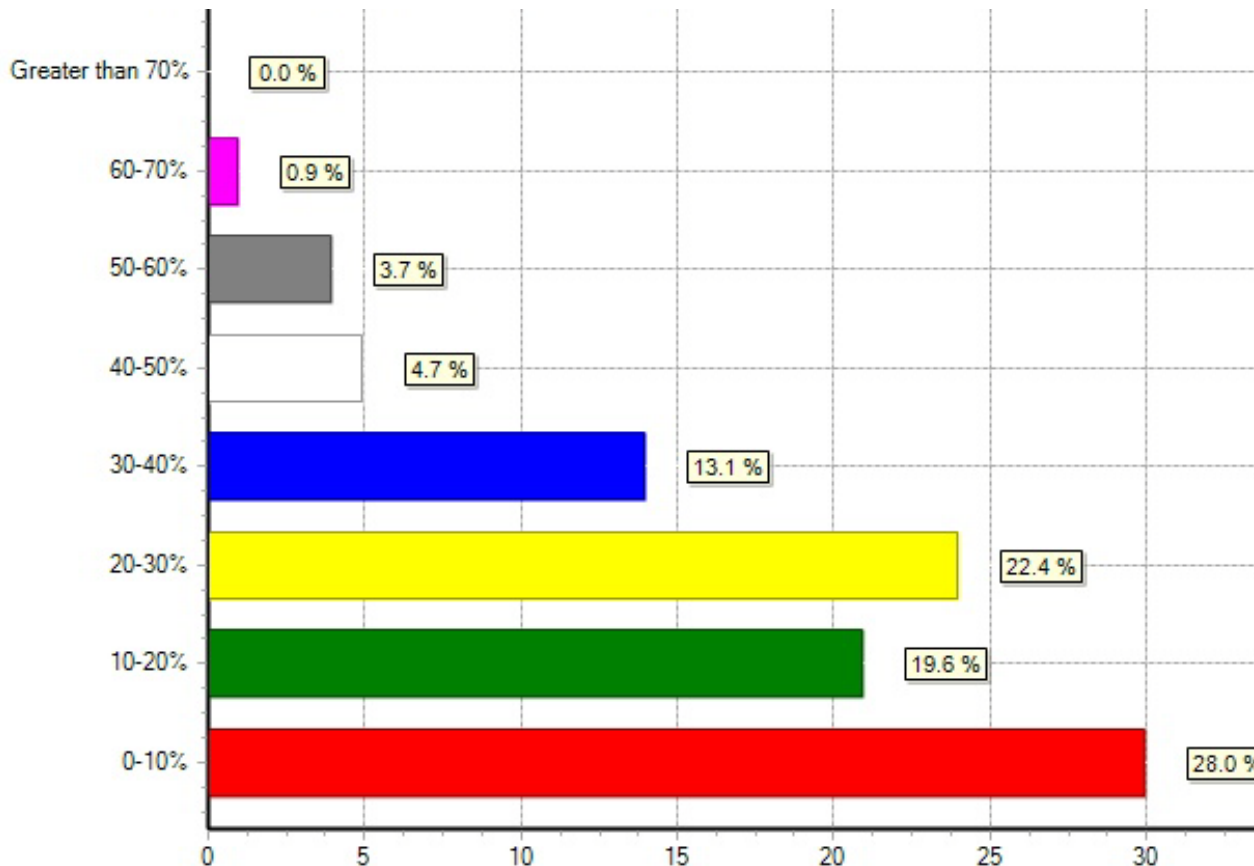➢ What can you do to assure low-risk transition to contract delivery?

❑ **Positioning to Excel Next Time**

➢ How can you leverage "lessons learned" from your proposals to continuously improve your proposal capability?
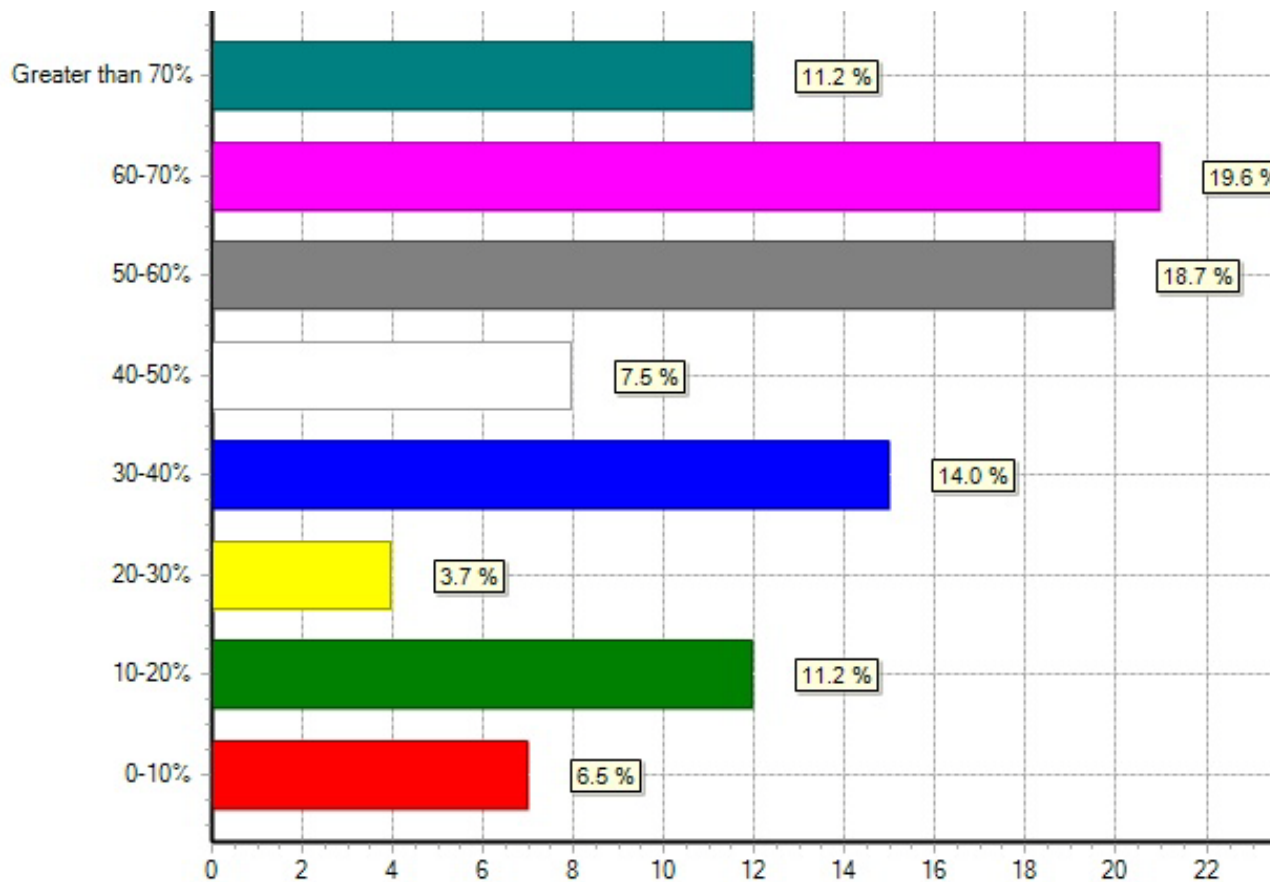
❑ **Questions and Discussion**

Percent of Budget Expended (1)

What actual percentage of the total Sales or BD budget is expended during the Pre-RFP phase of the BD process?

| Category	Percentage
Greater than 70%	0.0 %
60-70%	0.9 %
50-60%	3.7 %
40-50%	4.7 %
30-40%	13.1 %
20-30%	22.4 %
10-20%	19.6 %
0-10%	28.0 %

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Percent of Budget Expended (2)

What actual percentage of the total Sales or BD budget is expended during the RFP Response phase of the BD process?
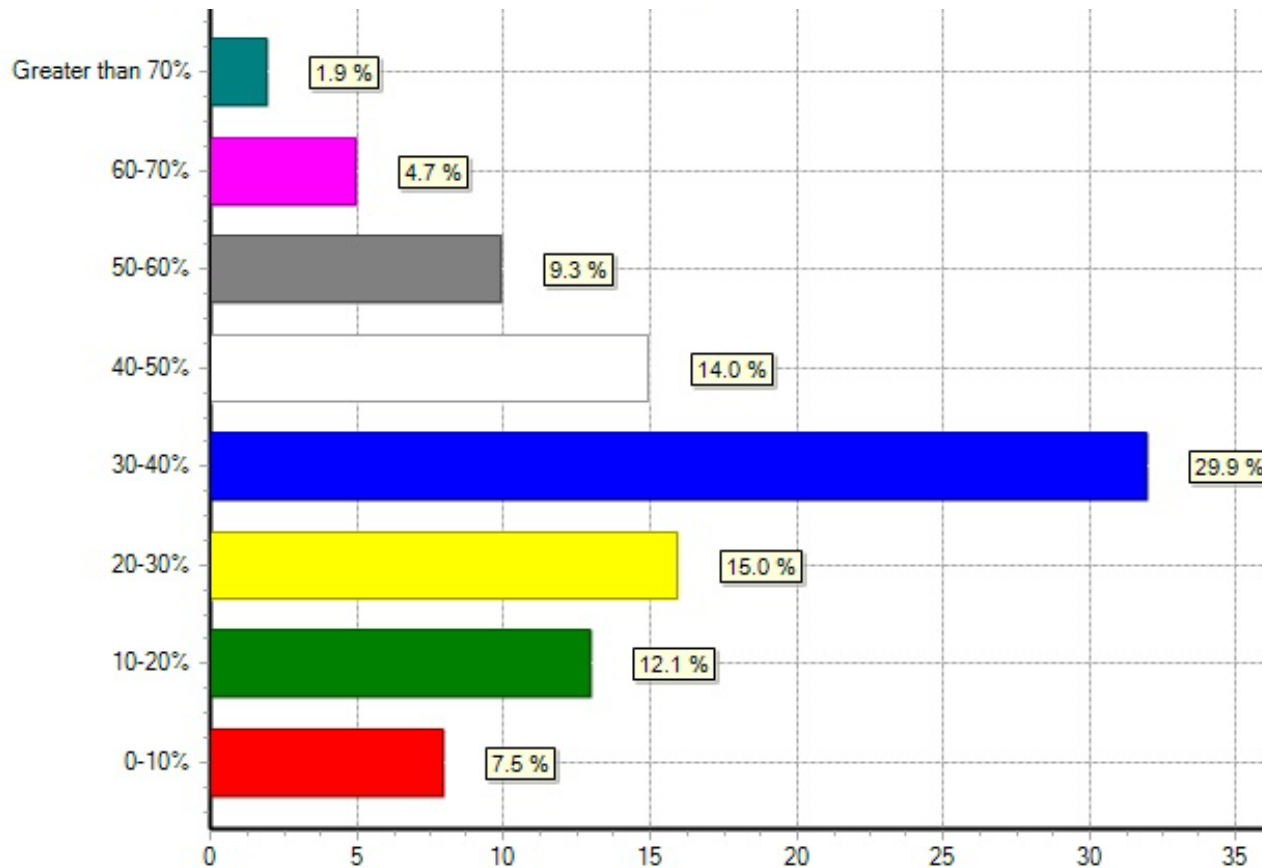
Percent of Budget Expended (3)

What actual percentage of the total Sales or BD budget is expended during the Post-RFP phase of the BD process?
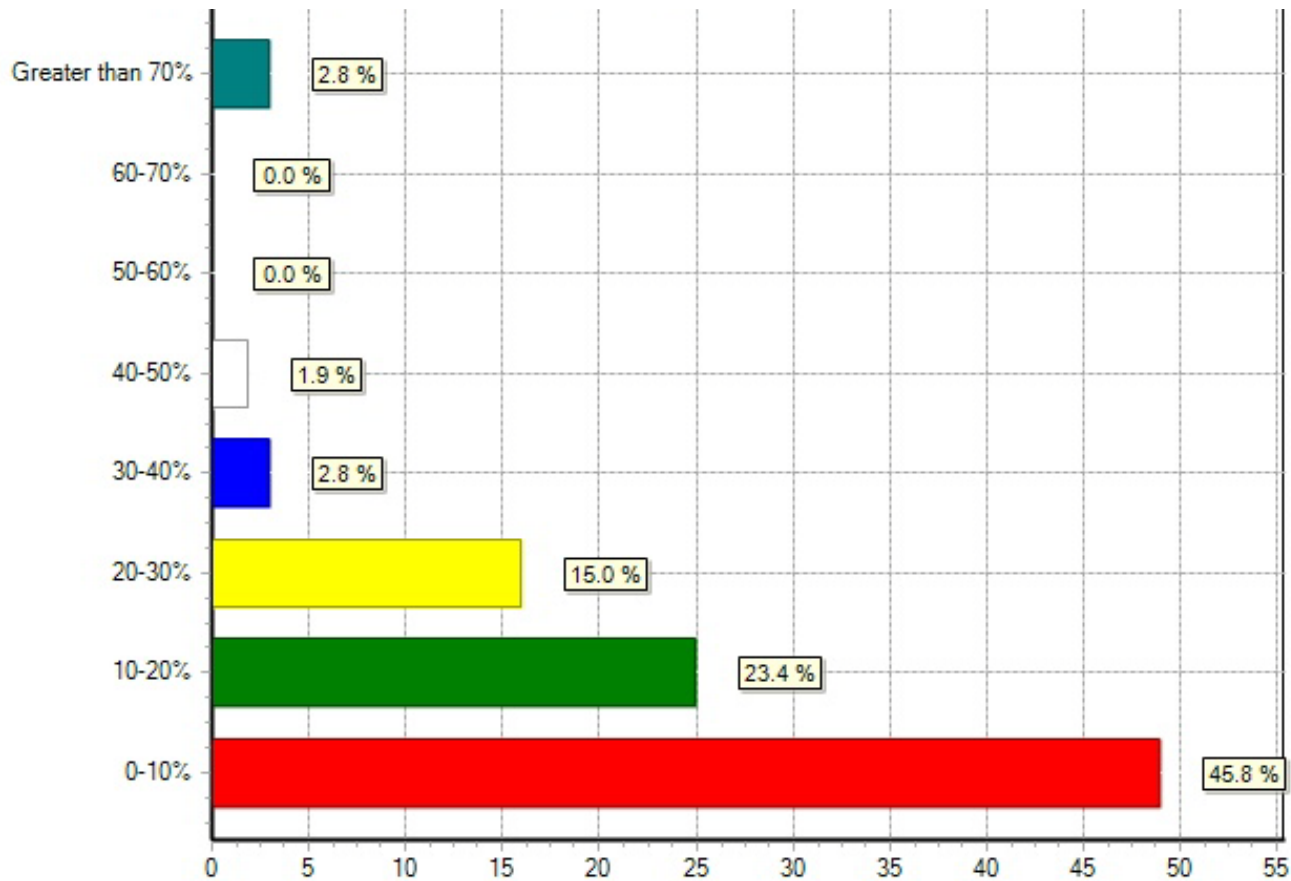
"Reasonable" Budget (1)

What percent of the total BD budget would you consider reasonable to spend during the Pre-RFP phase of the BD process?

"Reasonable" Budget (2)

What percent of the total BD budget would you consider reasonable to spend during the RFP Response phase of the BD process?
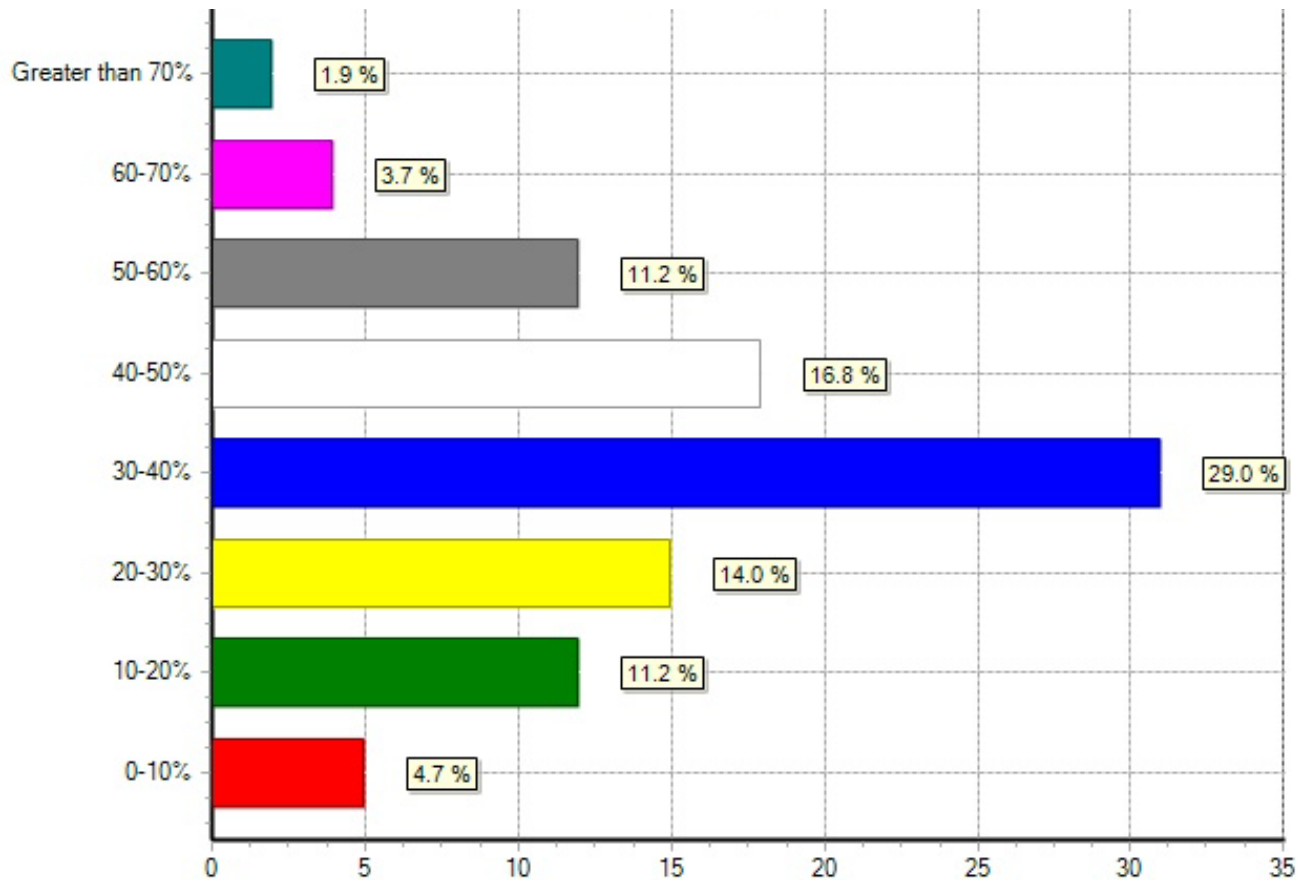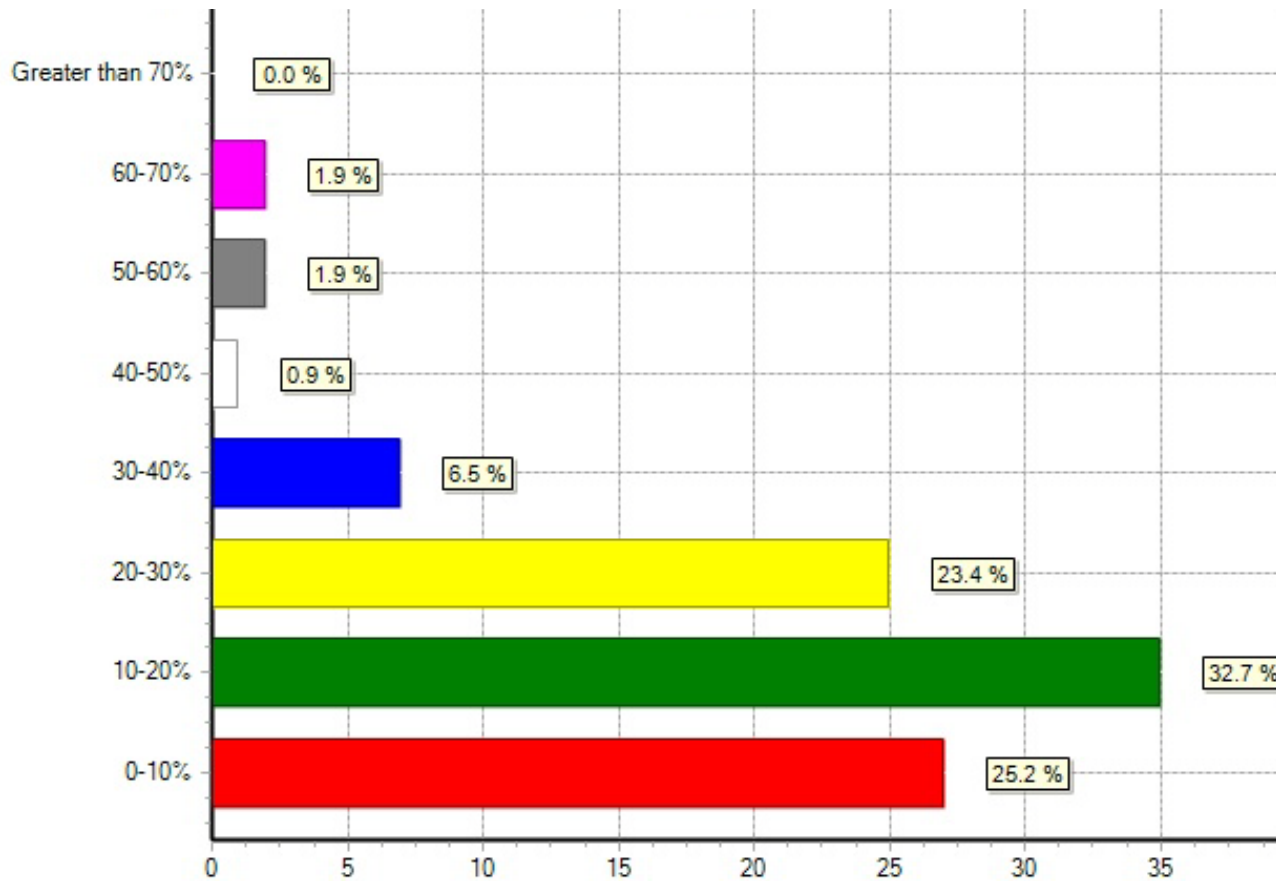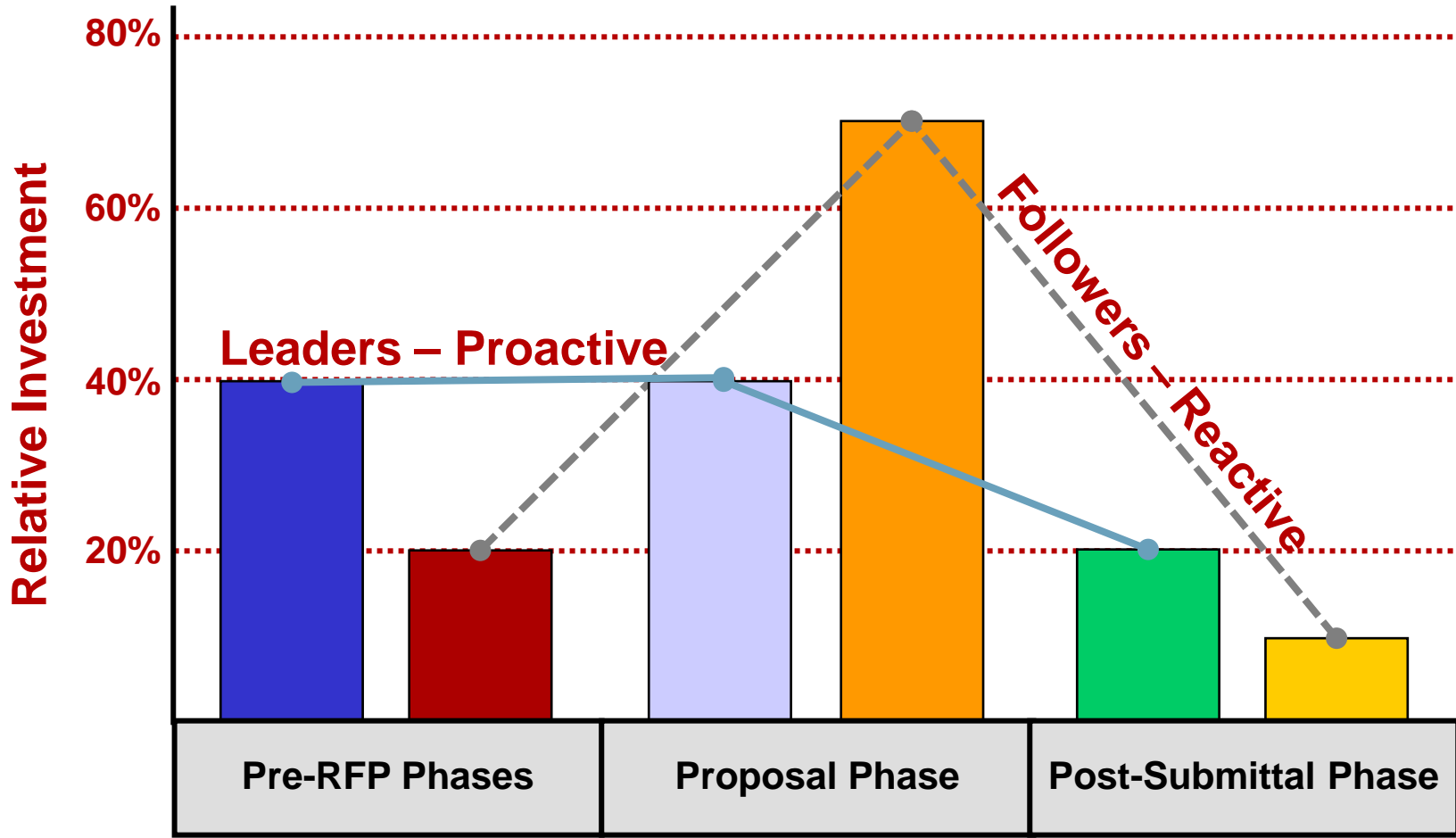
"Reasonable" Budget (3)

What percent of the total BD budget would you consider reasonable to spend during the Post-RFP phase of the BD process?

Leaders versus Followers

Relative Investment

- 80%
- 60%
- 40%
- 20%

Leaders – Proactive

Followers – Reactive

Pre-RFP Phases | Proposal Phase | Post-Submittal Phase

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Principle: Finish the Race

Mature BD organizations recognize that proposal submittal is a key milestone but that the race is far from over

- ❑ **Keep your core team intact and engaged**
- ❑ **Don't stop communi-cating your message**
- ❑ **Stay focused on being competitive**
- ❑ **Assure that your solution is proven**

Practice: Keep the Core Team

❑ **Consensus**

- ➢ Overall capture/proposal schedule should anticipate need to staff post-submittal activities

- ➢ Personnel continuity is essential for follow-through, including during contract start-up

- ➢ Core team needs to include capture manager, proposal manager, program manager, and key specialists

❑ **Best practice**

- ➢ Have the core team perform a <u>thorough, integrated</u> review of the proposal shortly after submittal as the first step in preparing for ENs, FPR(s), negotiation, and program start-up

Keeping the core team intact and engaged is essential for effective completion of a pursuit

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Practice: Maintain the Message

❑ **Consensus**

➢ While direct communication with the Customer may not be possible, it's still possible to continue selling the team and solution

➢ It's always beneficial to update the message based on additional insight into the Customer and competitors gained after submittal

➢ Don't forget that Contracting focal points still communicate

❑ **Best practice**

➢ Prepare and execute a formal post-submittal communications plan, including advertising, media, and community outreach

▪ *Draw on Marketing Communications staff*

Maintain your message through a combination of formal and informal communication

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Practice: Update Your Position

❑ **Consensus**

  ➢ After proposal submittal, it remains imperative to continue gathering competitive intelligence and executing your contact plan

  ➢ Waiting for the Customer to ask questions or request an FPR often doesn't allow sufficient time to clearly work through issues that need to be addressed

❑ **Best practice**

  ➢ Conduct a formal post-submittal review of your proposal to identify weaknesses and to drive strategy for ENs, FPR, and transition

    ▪ *Include a Blue Team to validate updated strategies*

Staying proactive after proposal submittal allows continuing competitive discrimination

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Practice: Demonstrate Solution

❑ **Consensus**

➢ Given the increasing importance of risk mitigation, it is especially good to have proposed post-submittal tasks that can be reported to the Customer as proposal updates

➢ Being able to demonstrate key aspects of the proposed solution – whether related to technical, management, or cost – allows you to "stay ahead" of the competition

❑ **Best practice**

➢ Make post-submittal demonstrations a key strategy for technical risk reduction, validation of cost assumptions, and early transition preparations

Planned demonstrations invite Customer questions and create competitive opportunities

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Principle: Prepare to Deliver

Leading competitors leverage post-submittal time to fulfill their proposed commitment to reduced risk and seamless transition to contract

❑ **Execute your proposed transition plan and risk-reduction activities**

❑ **Update pricing through a cost-to-perform review based on your proposal**

❑ **Conduct a pre-award program readiness review based on the proposed program plan**

❑ **Plan resources needed to initiate the contract**

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Practice: Invest in Transition

❑ **Consensus**

➤ Committing to pre-award transition activities is one of the most persuasive ways to "sell" managed risk for program start-up

➤ An especially effective approach is to include your draft transition plan, including specific assignments and detailed plans for Customer interface, in your proposal

➤ Including a detailed IMP/IMS or other tool is an excellent way to communicate full understanding of what needs to be done

❑ **Best practice**

➤ Assign an experienced transition manager, supported by "surge resources" (as needed), in addition to the program manager

A highly credible transition plan can be the deciding factor for many Customers

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Practice: Validate Cost/Price

❑ **Consensus**

➢ In today's increasingly price-sensitive environment, it's even more important to update the cost proposal and IMP/IMS to reflect changes from ENs, FPR and negotiations

➢ Performing a post-submittal cross-check of the technical proposal with the cost proposal is an essential preparation for FPR

❑ **Best practice**

➢ Update your PTW analysis and strategy with a formal "cost-to-perform" analysis prior to developing FPR and negotiation strategy

Updated intelligence should allow FPR strategy to result in a more competitive price

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Practice: Verify Readiness

❑ **Consensus**

➤ Ultimately, the pursuit is about securing and delivering a contract

➤ A thorough review and annotation of all commitments and requirements can identify areas that need additional preparation

❑ **Best practice**

➤ Hold a formal project readiness review before anticipated award to assess how well the team is prepared to perform

Being ready to perform addresses one of the most fundamental reasons for failure

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Practice: Plan Contract Start-up

❑ **Consensus**

  ➢ The post-submittal period allows time to perform a more detailed assessment of risks and requirements, based on final decisions made during proposal preparation

  ➢ It's imperative that the company be able to fully support program start-up on Day #1, especially for service contracts

❑ **Best practice**

  ➢ Bring on external SMEs for the first 90 days ARO

    ▪ *Mitigate inevitable unavailability of some internal staff*

    ▪ *Allow time for key personnel to transition from other contracts*

Getting the new contract "off to a good start" is essential to successful performance

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Principle: Pursue Excellence

Companies committed to continuous improvement passionately pursue "lessons learned"

- ❑ **Fully exploit a range of approaches to gathering lessons learned**

- ❑ **Focus on team innova-tions and institutionalize them immediately**

- ❑ **Be especially concerned about systematic issues and systemic improvement**

- ❑ **Don't forget that every completed project presents an opportunity to enhance knowledge content**

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Practice: Expand the Scope

❑ **Consensus**

  ➢ Don't limit lessons learned to the period from RFP to proposal submittal

  ➢ Focus lessons learned on the overall pursuit life cycle

❑ **Best practices**

  ➢ Implement a policy for all "must wins" that there be a thorough assessment of how they were performed across the BD life cycle

  ➢ Include an assessment of contract start-up (first 90 days) as part of the lessons-learned process

    ▪ *Learn what parts of technical and management plans did and didn't work*

Analysis of performance across the BD life cycle maximizes potential to improve

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Practice: Identify Innovation

❑ **Consensus**

➤ The impact of lessons learned is often limited by typical focus on what went wrong

➤ Often teams on large pursuits develop highly useful solutions to process problems

❑ **Best practice**

➤ Create "growth enabling initiatives" to communicate improvements

▪ *New tools and other innovations can benefit both small and large pursuits*

The cumulative impact of smaller, incremental improvements can be very significant

Practice: Plan Systemic Growth

❑ **Consensus**

➢ Having a core of proposal experts who work on every proposal allows good ideas to become part of continuous improvement

➢ The lessons-learned process should not be cumbersome

▪ *Make post-submittal lessons learned fun!*

❑ **Best practice**

➢ Focus on "horizontal" reviews of BD projects to detect patterns of both strengths and weaknesses

▪ *Hold an annual review to define the next year's process improvement plans*

Executives are most likely to fund improvements with systematic impact

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Practice: Harvest Content

❑ **Consensus**

- ➢ An important part of lessons-learned analysis involves where individual teams have addressed topics in excellent ways

- ➢ Good content needs to be "harvested" for inclusion in reuse databases and knowledge-management systems

❑ **Best practice**

- ➢ Have proposal specialists highlight excellent content, and allow proposal core teams to "rate" content for prospective reuse

Maintaining a focus on content excellence is essential for good reuse databases

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