How to Get the Most Out of Your Color Teams

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Topics for Discussion

- Definitions
- Timeline/Sequence
- Why Bother?
- General Keys to Success
- Capture Phase Reviews
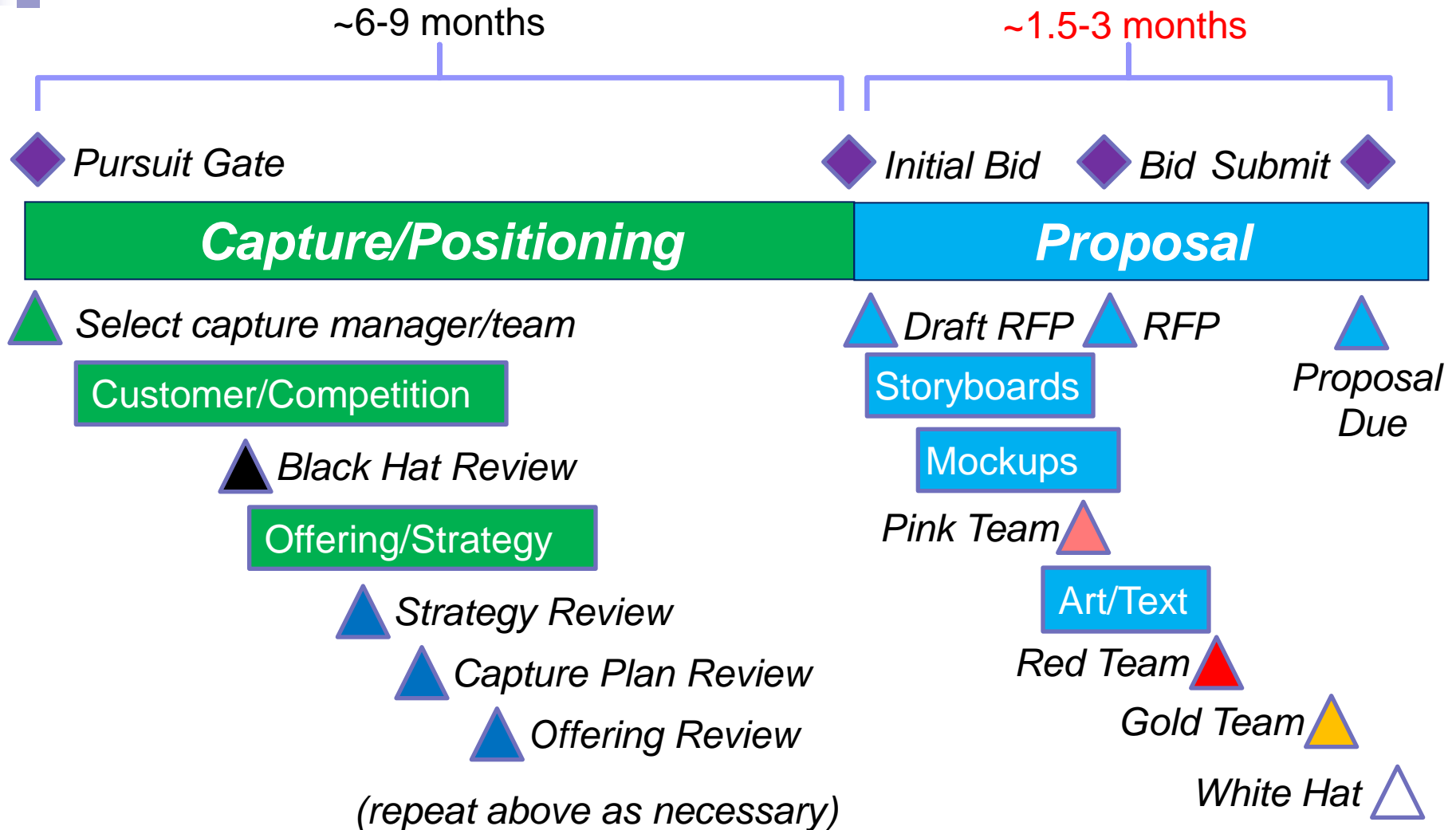- Proposal Phase Reviews
- Summary

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Definitions

- (Capture) Strategy Reviews (Blue Team)
- Capture Planning Reviews
- Competition Reviews (Black Hat)
- Proposal Reviews (Pink Team, Red Team, Gold Team)
  - ☐ Pink: Storyboards, Mockups, Proposal Strategy
  - ☐ Red: Text & Graphics
  - ☐ Gold: Final Product
- Lessons Learned Reviews (White Hat)

Business Development Timeline

~6-9 months   **~1.5-3 months**

◆ *Pursuit Gate*   ◆ *Initial Bid*   ◆ *Bid Submit* ◆

Capture/Positioning	*Proposal*

▲ *Select capture manager/team*   ▲ Draft RFP ▲ RFP   ▲

Customer/Competition   Storyboards   *Proposal Due*

▲ *Black Hat Review*   Mockups

Offering/Strategy   *Pink Team* ▲

▲ *Strategy Review*   Art/Text

▲ *Capture Plan Review*   *Red Team* ▲

▲ *Offering Review*   *Gold Team* ▲

(repeat above as necessary)   *White Hat* △

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Why Bother?

- Your first thought may be: Why fight city hall?
- Because…
    - You're a professional!
    - Significant costs: direct, direct and opportunity costs
    - Impact of results
    - Interruptions to "normal" business of producing product/proposal
- Challenge: measuring effectiveness of reviews
    - Collect data, analyze feedback, capture costs

General Keys to Success (IMHO)

- **Limit the purposes of each review (2-3 objectives each)**
  - Don't ask the Red Team to do everything: messages, strategy, compliance, executability, affordability, …

- **Select the right people based on the purpose of the review**
  - Example: For a Red Team, use the proposal outline, not your Rolodex or "the usual suspects"
  - Black Hat: select attendees based on their knowledge of the specific competitors

- **Focus the feedback**
  - Ask specific questions *(more on this later)*
  - Summarize and prioritize results

Capture Phase Reviews (Overview)

- Strategy Review
- Capture Plan Review
- Offering/Solution Reviews
- Black Hat Review

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(Capture) Strategy Reviews

- Purpose: provide objective feedback on overall strategy and capture focus
    - At least once during capture phase
- Typical Problems:
    - One day brainstorming based on briefing by capture manager
    - Dependent on customer knowledge of reviewers
- Improvements:
    - Hire "outside" participants based on their knowledge of the customer or competition
    - Use other reviews to address details (next slide)
- Results: better feedback, objective feedback

Capture Planning Reviews

- Purpose: review details in capture <u>plan</u>, and (*separately*) review <u>offering</u>/approach/baseline
- Typical Problems:
    - Seldom used, not a thorough/detailed review
    - Confused with Strategy Review
- Improvements:
    - Review capture plan as a document by peers
    - Review offering (tech, mgmt, price) by peers for breadth, depth and competitiveness
- Results: feedback on the details of offering & rationale for strategy

Competition Reviews (Black Hat)

- Purpose: develop competitor's likely offering
- Typical Problems:
  - Too much time spent on "strategy" (theirs or ours)
  - Not focusing on competitor's likely offering (tech, mgmt, pricing approach)
  - Inviting the wrong people
- Improvements:
  - Focus on competitor's offering
  - Invite experts familiar with the competition
  - Don't discuss strategy (theirs or ours) at this meeting
- Results: constructive ideas on competitor's offering

Proposal Phase Reviews (Overview)

- Pink Team
- Red Team
- Gold Team
- Lessons Learned (White Hat)

Proposal Reviews (Pink Teams)

- Purpose: validate implementation of proposal strategy in Storyboards & Mockups
- Typical Problems:
  - Too many objectives for review team
  - Reviewers unable to deal with format of Storyboards & Mockups
  - Vague feedback / conflicting feedback
- Improvements:
  - Thorough training on how to evaluate mockups
  - Ask reviewers specific questions (Yes/No)
  - Encourage constructive "recommendations"
- Results: recommendations of how to fix problems

Proposal Reviews (Red Teams)

- Purpose: customer evaluation simulation
- Typical Problems:
  - Too many objectives for review team
  - Vague feedback / conflicting feedback
  - Process not customized to customer processes
  - Vertical evaluation vs. horizontal evaluation
- Improvements:
  - Ask reviewers specific questions (Yes/No)
  - Tailor process to customer's processes (Past Performance, Risk, etc.)
  - Conduct "mini-horizontal" evaluation
- Results: more accurate assessment of what your customer will say about your proposal

Specific Yes/No Questions
Focusing Your Pink & Red Teams

- **Example Pink Team questions:**
  - ☐ Is our approach or solution unique/distinctive?
  - ☐ Have we identified the right customer issues?
  - ☐ Have we identified the right features and benefits of our approach?
  - ☐ Is our section theme compelling?

- **Example Red Team questions:**
  - ☐ Do we substantiate our major claims?
  - ☐ Are the key graphics persuasive?
  - ☐ Does the section begin with our most important feature/benefit?
  - ☐ Is the section responsive to the RFP?
 - ☐ Does the section explain "Why Us?"

- **Always ask for recommendations/improvements?**

Gold Team Review

- Purpose: final pre-production review, ensure Red Team fixes are incorporated
- Typical Problems:
  - Reviewers have not read proposal before
  - Major, strategic changes that cause serious breakage
- Improvements:
  - Proposal "core team" instead of Executives
  - Only "must fix" changes
  - Convince Executives to rely on gate reviews, and to trust proposal leaders & Red Team
- Results: less stress, fewer counter-productive changes at the last minute

Lessons Learned Reviews
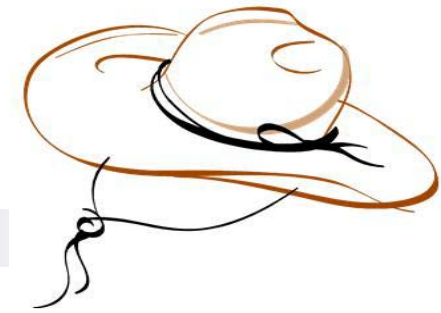
- Purpose: improve process, training, tools, and win rate

- Typical Problems:
    - Done too late (after Award), not objective, no "preventive mechanisms" defined & institutionalized
    - "Blame atmosphere" not addressed beforehand
    - No (B&P) budget left for effective process

- Improvements:
    - Use objective facilitator and/or anonymous tools
    - Written survey <u>first</u> with follow-up interviews
    - Gather feedback soon after proposal submission, update later
    - Focus on "preventive actions" (process, training, etc.)

- Results: less blame & innuendo, more prevention

General Planning Tips

- Start planning early
- Pick the right people for each type review
  - Not the usual suspects every time
- Maintain list of "good reviewers" for each type review
- Focus review on a few key objectives
- Gather data on successful outcomes & costs
- Tailor review team training and vary methods

Gauging the Effectiveness of Reviews

Techniques:

- Measure each type of review against specific objectives
- Conduct thorough "outcome assessments" (capture to red team to initial evaluation, "tie-breakers")
- Benchmark study or 6-Sigma study
- Independent, objective (3rd party?) analysis of evaluation results
- Interview review veterans: reviewers and "reviewees"
- Talk to the customer—after protest period is over
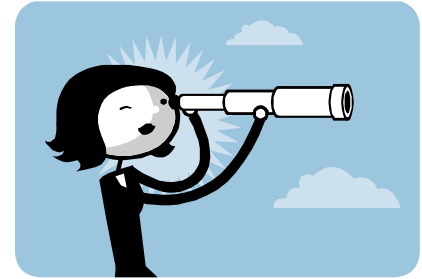
Summary

If you decide to take this challenge…

- Clarify your objectives
- Be realistic about your approach/goals
- Keep records on what happened & when
- Measure effectiveness against concrete terms
- Customize for different customers (Red Teams)
- Train review team leaders
- We can help improve your processes!

Thanks for coming!

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Thanks for coming!

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