



Mind Mapping Techniques to Create Winning Proposals

10-26-2012

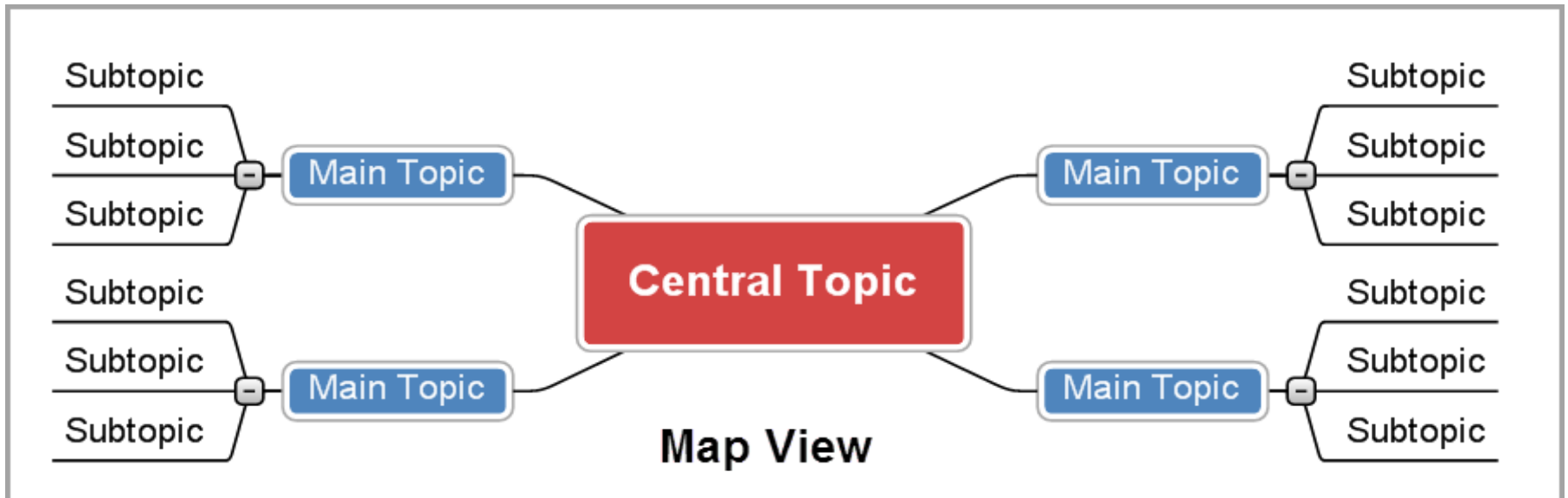
Jim Franklin
Project Manager



- ▶ Introduction
- ▶ Objectives
- ▶ What is Mind Mapping?
- ▶ Mind Mapping Techniques to Create Winning Proposals
- ▶ Demonstration

What is Mind Mapping?

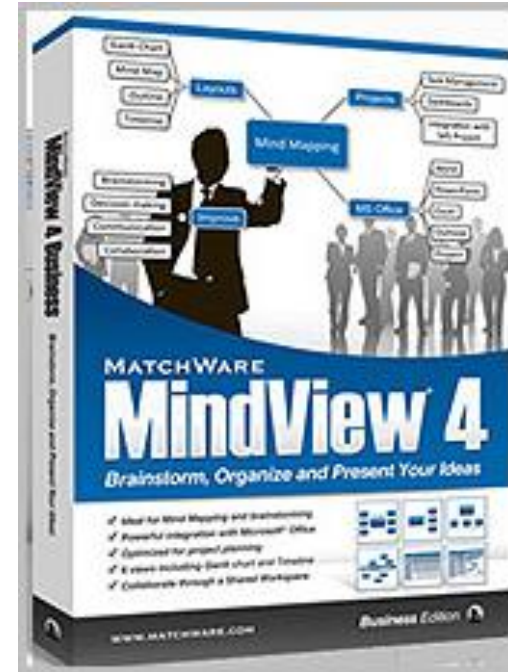
- ▶ *A mind map is a diagram used to represent words, ideas, tasks, or other items linked to and arranged around a central key word or idea.**



*Mind Maps as Classroom Exercises John W. Budd The Journal of Economic Education , Vol. 35, No. 1 (Winter, 2004), pp. 35-46 Published by: Taylor & Francis, Ltd. Article Stable URL: <http://www.jstor.org/stable/30042572>

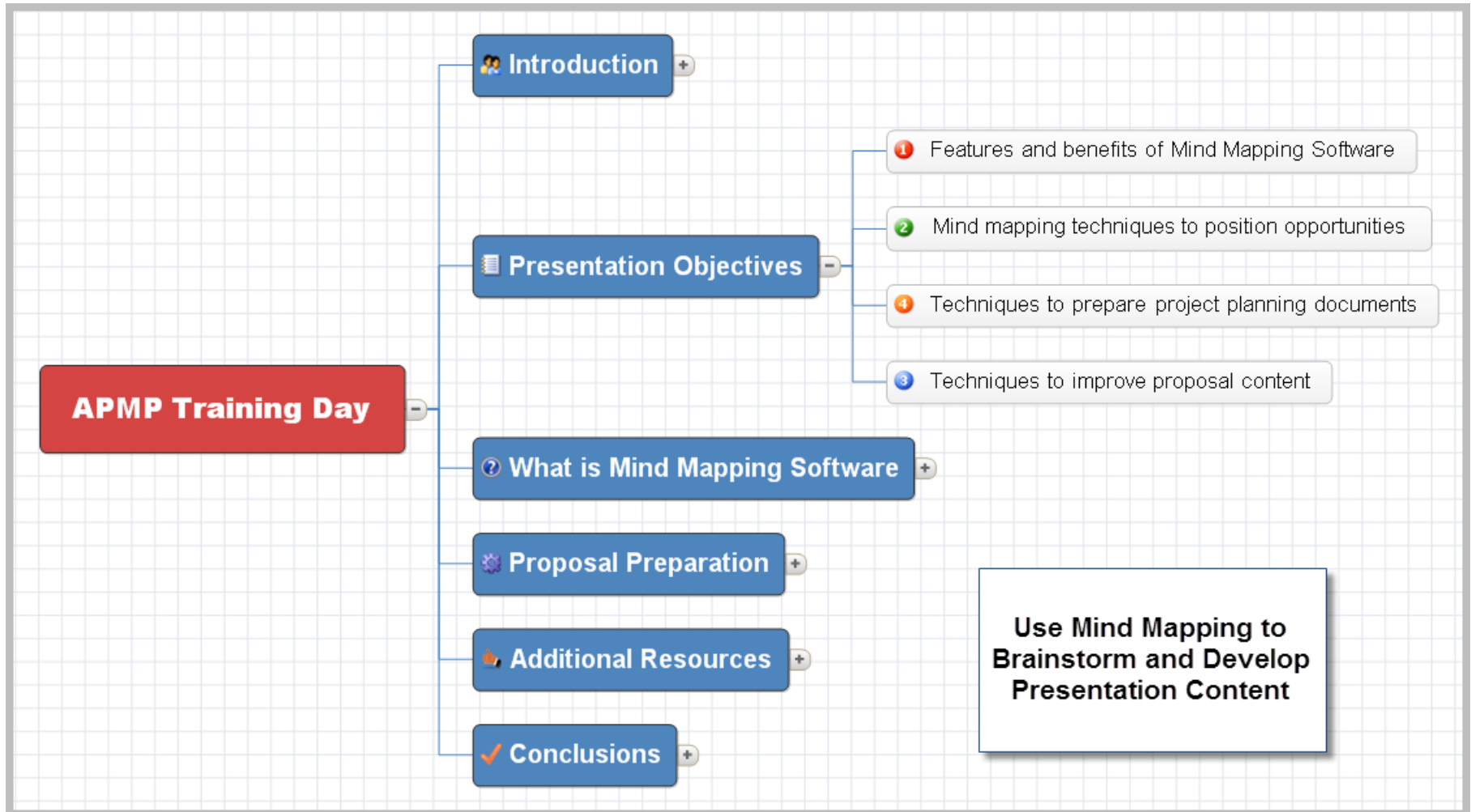
Mind Mapping Software – Features and Benefits

- ▶ Improves Brainstorming, Problem Solving, and Collaboration
- ▶ Optimized for Project Planning
- ▶ Improves writing content
- ▶ Powerful Integration with Microsoft Office
- ▶ Built-in Gantt Chart



A Project Manager's Integration Tool

Mind Map Example – Presentation Map





Mind Mapping Techniques to Create Winning Proposals

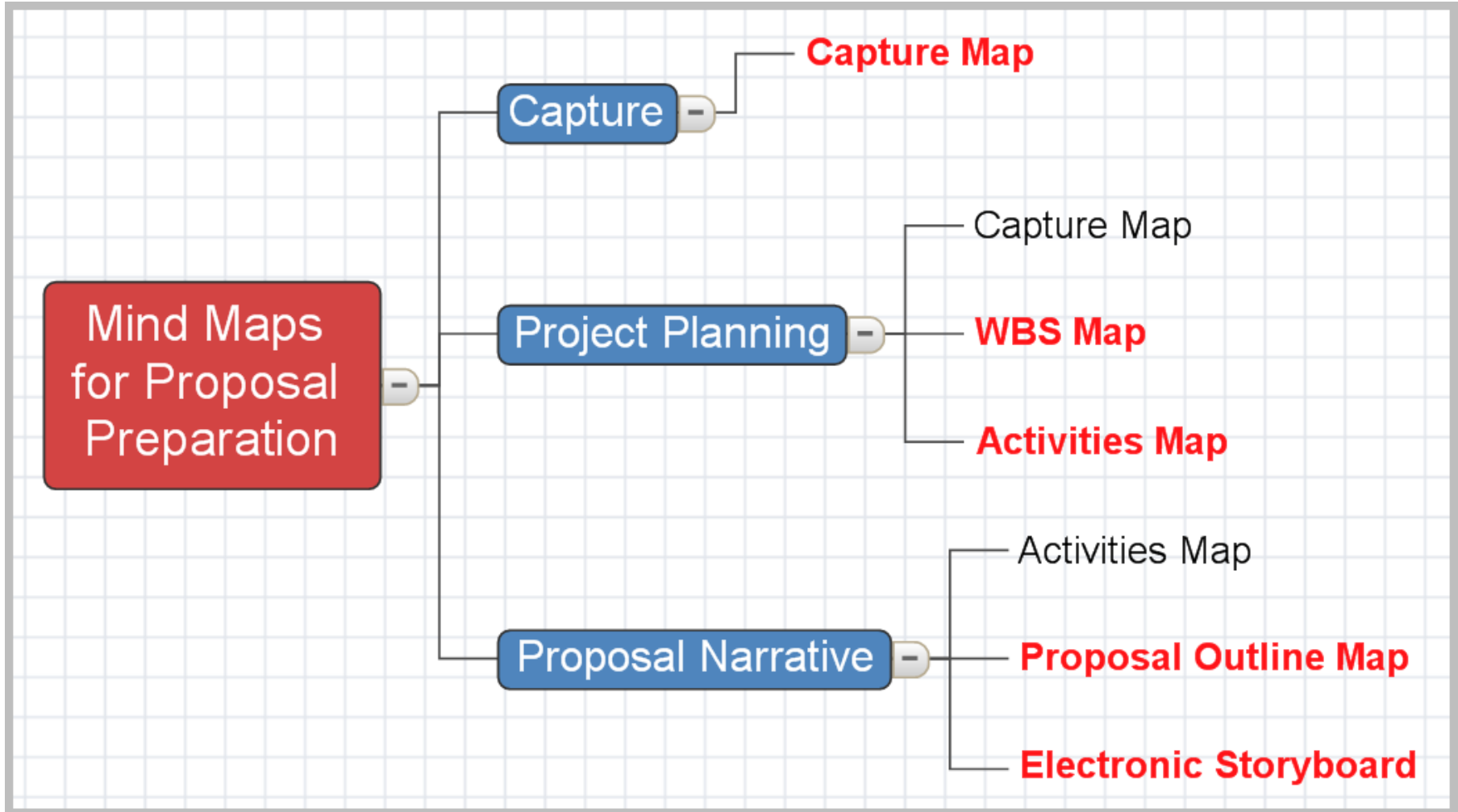
Why is Proposal Preparation Difficult?



Proposal Preparation Challenges

- ▶ Multiple Award Contracts
- ▶ Fixed-Priced Task Orders
- ▶ Design-Build or Performance Based Contracts
- ▶ Incomplete Statements of Work
- ▶ Proposals Due within One Month of RFP
- ▶ Project Planning Team Silos

Mind Maps to Create Winning Proposals



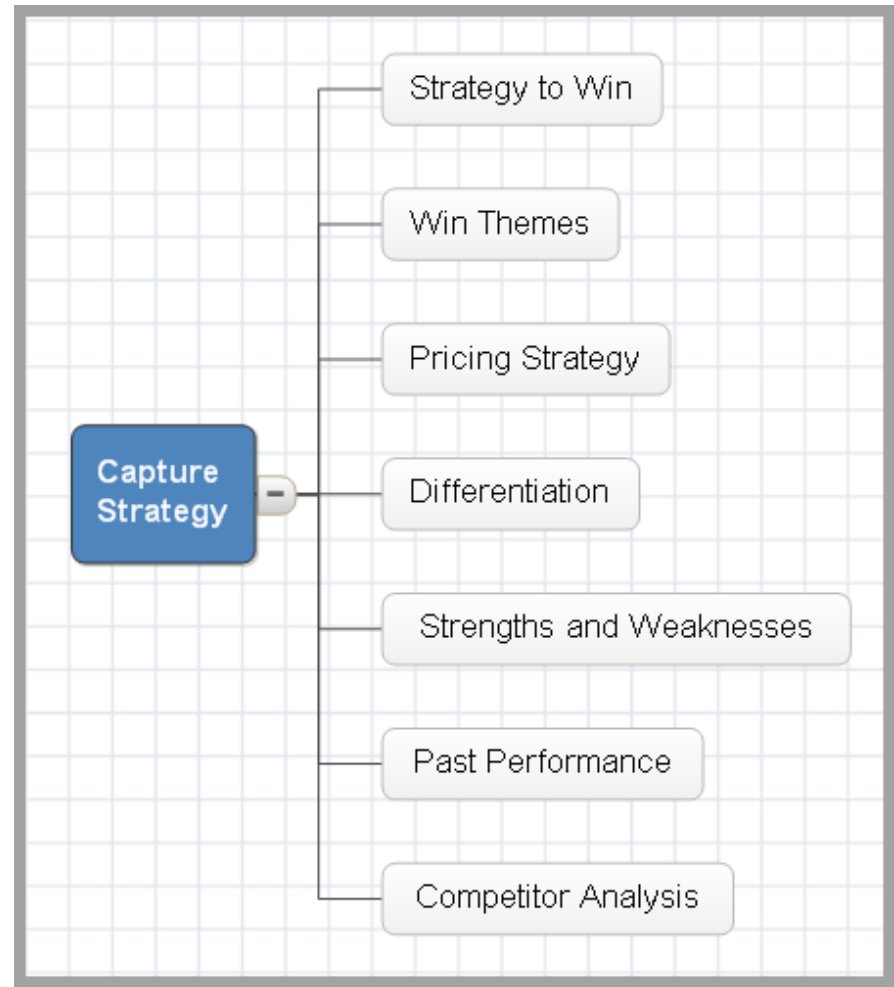
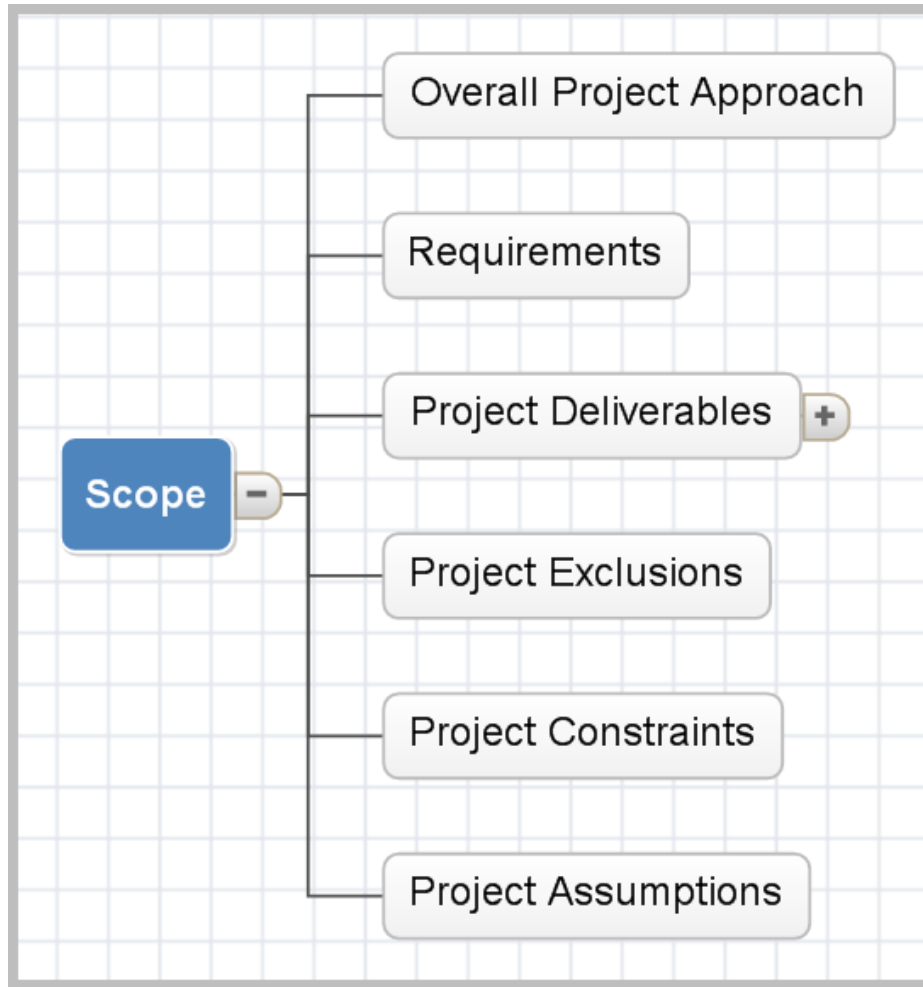
Capture Map – Develop Winning Strategy

- ▶ Integrates Capture Strategy and Project Planning
- ▶ Brainstorm and Document Scope Requirements
- ▶ Leverage Map Content
 - Project Charter
 - Capture Strategy
 - Scope Definition
 - Work Breakdown Structure (WBS)
 - Identify Risks



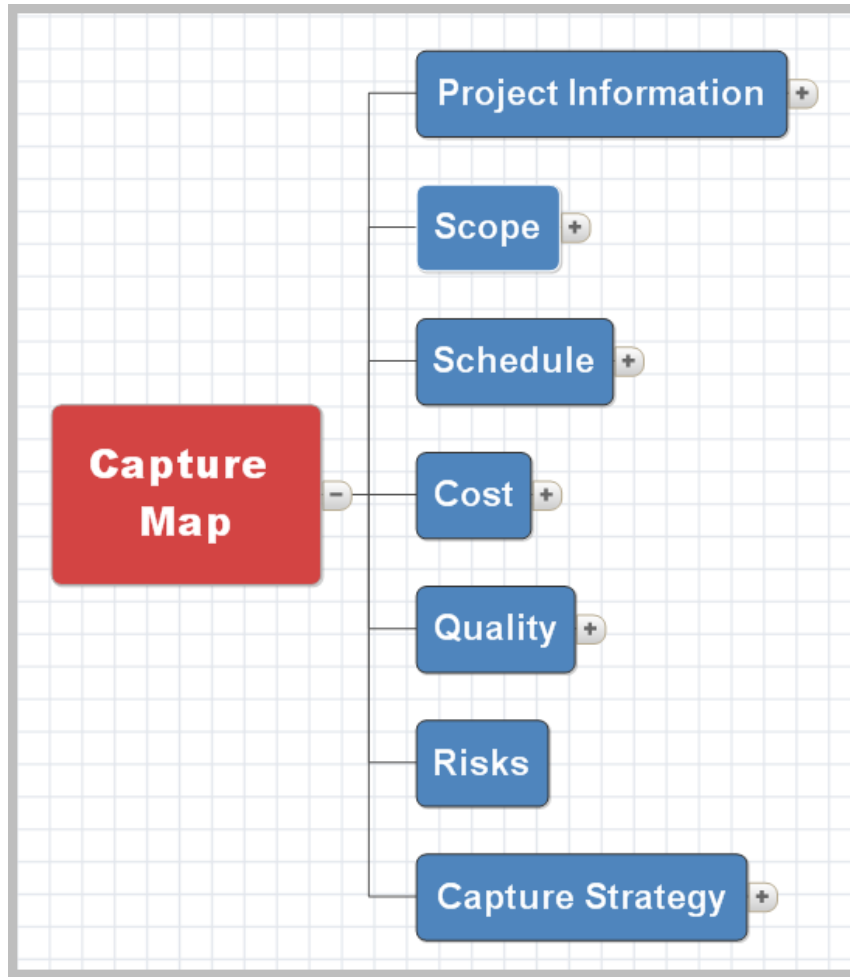
Position opportunity prior to RFP

Capture Map



Integrates Project Planning and Capture Strategy

Key Feature – Interchangeable Views

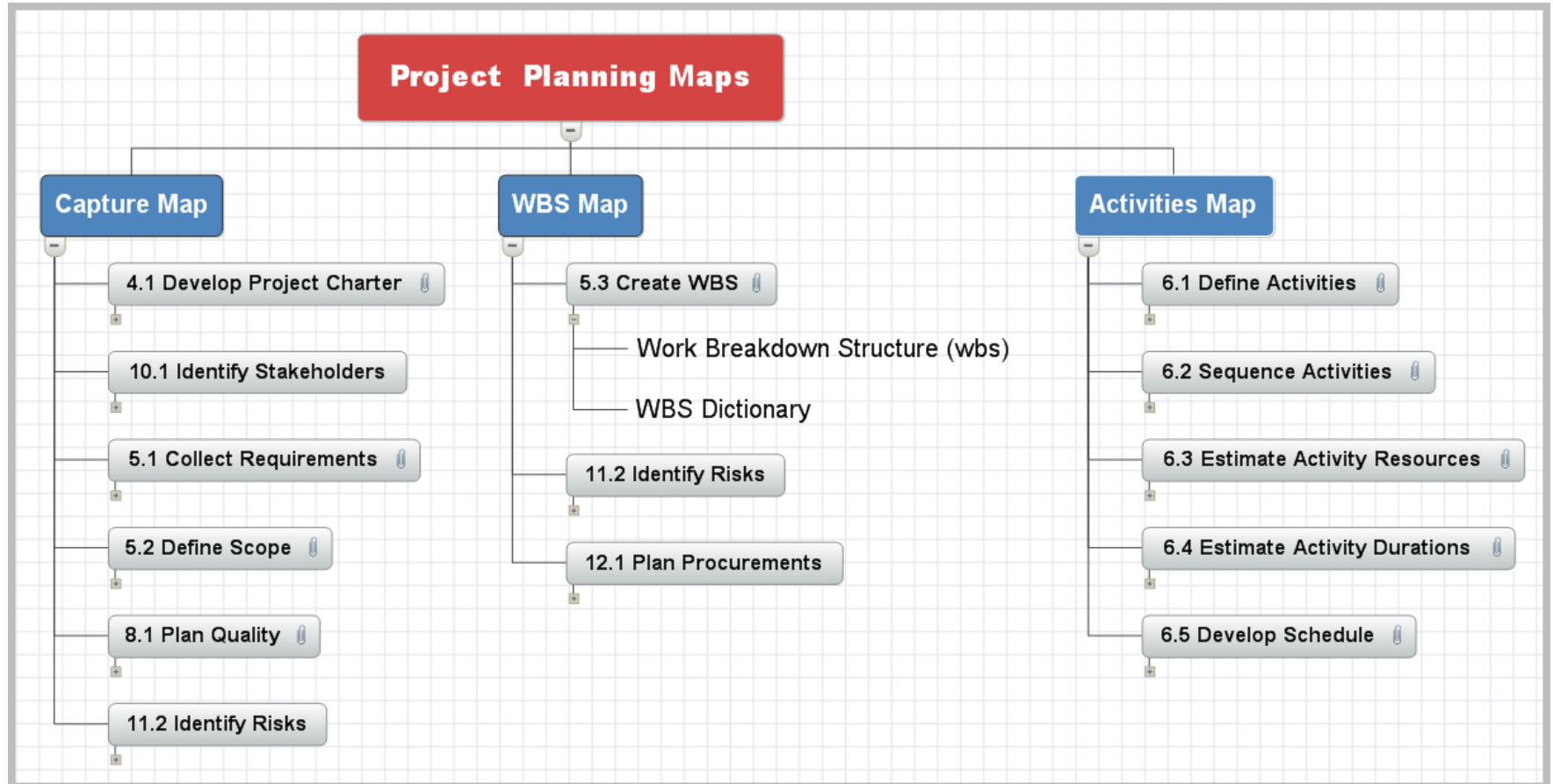


Planning Map	
<input type="checkbox"/>	Project Information
<input type="checkbox"/>	Goals
	Restore Sunnyvale Park
<input type="checkbox"/>	Objectives
	Restore Sunnyvale Park by December 2012 to be in compliance with City Codes
	Reduce electrical costs by 20 percent
<input checked="" type="checkbox"/>	Stakeholders
<input type="checkbox"/>	Scope
<input type="checkbox"/>	Overall Project Approach
	Meet with stakeholders
	Prepare Project Plans
	Mobilize to Field
	Clear and Grub and remove trash
	Perform site grading
	Trench Utilities
	Install Utilities
	Construct Hardscape
	Install Irrigation System
<input type="checkbox"/>	Requirements
	Irrigation system design will utilize low flow drip system
	Lighting will consist of solar panel lighting
	Existing vegetation shall be removed and recycled
	Softscape shall be native type plants and drought tolerant
	Hardscape shall consist of natural stone material
	Work shall be completed in 2012
	No field work until project plans are approved

Outline View

Map, Outline, Gantt, or Time-scale Views

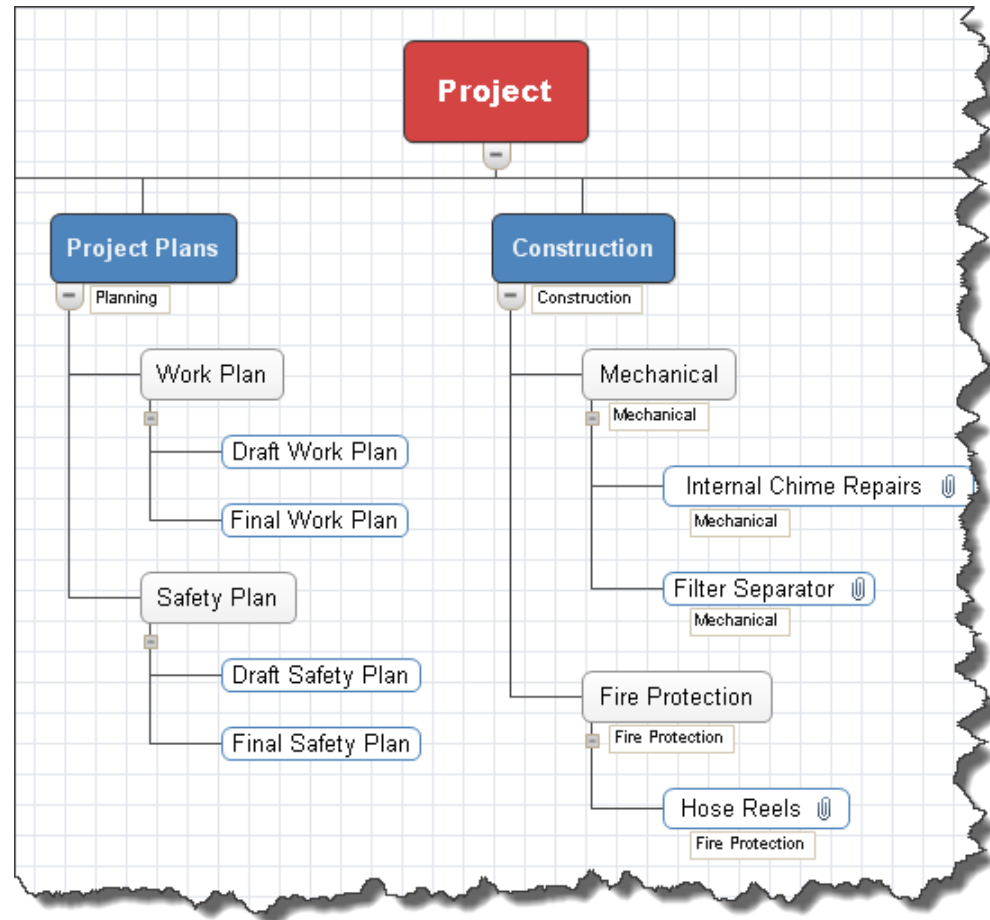
Create Project Planning Documents



Mind Mapping is an efficient tool to create Project Planning Outputs

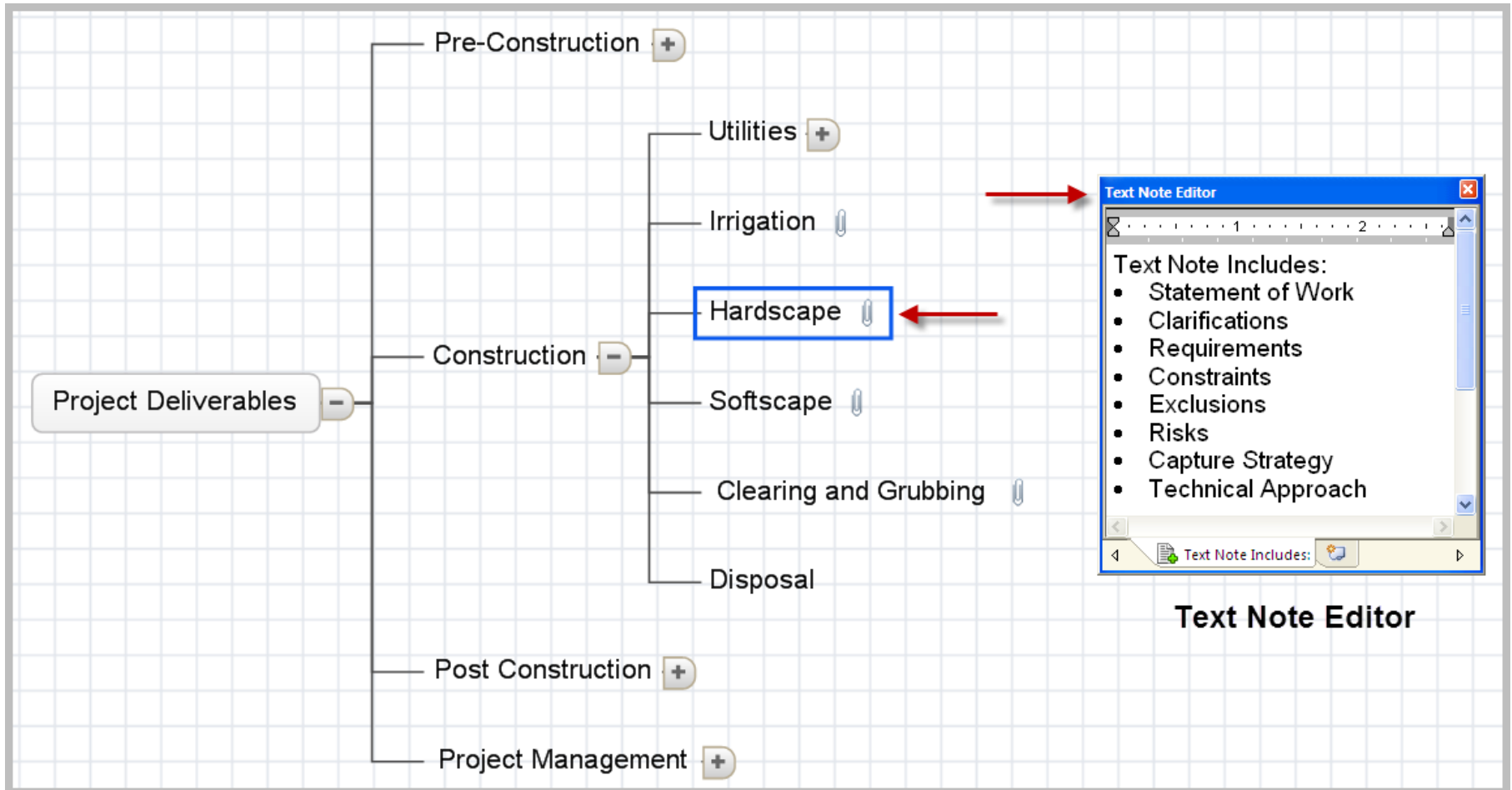
WBS Map

- ▶ Defines WHAT we will Deliver
- ▶ More Effectively Analyze Scope
- ▶ Update in Real-time
- ▶ Integrates Scope of Work
- ▶ Basis of Cost Estimate
- ▶ Input for Proposal Narrative



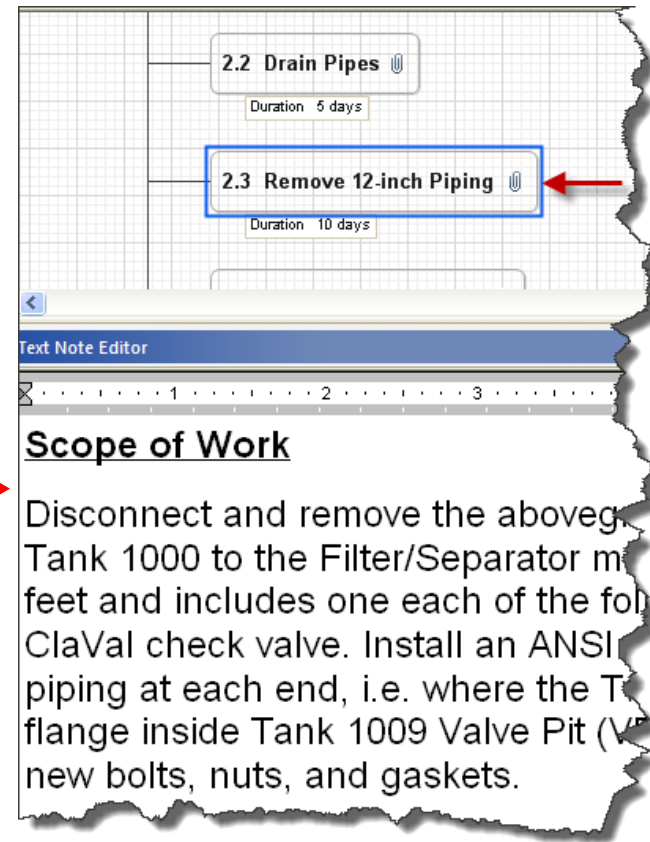
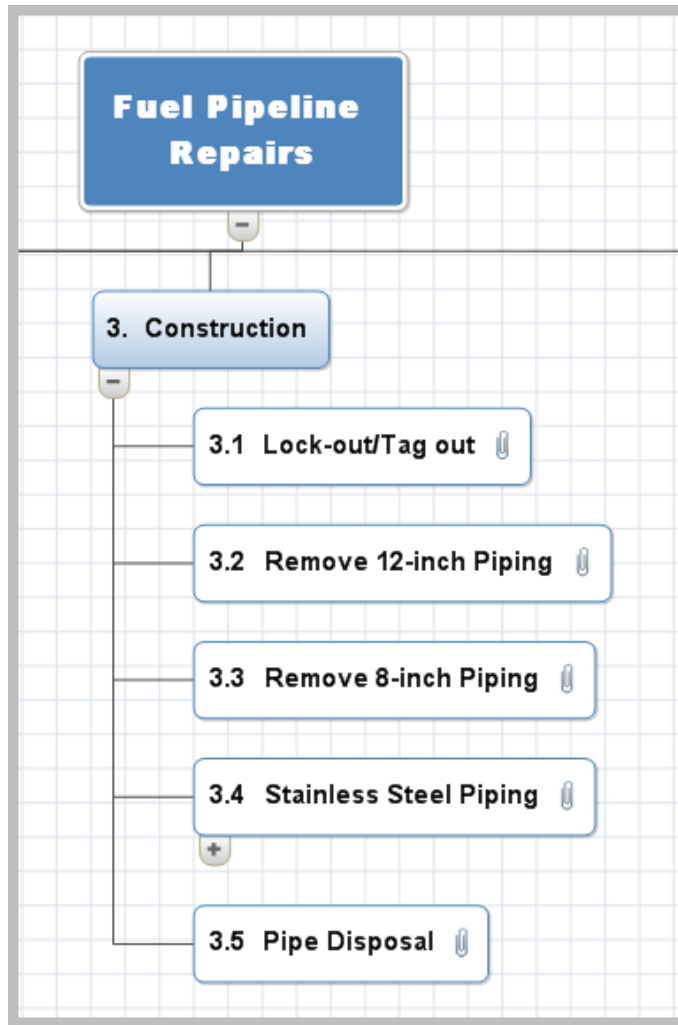
Review RFP and Create WBS

Key Feature – Text Note Editor



Benefit – Integrate scope details into WBS

Key Feature – Export to Word

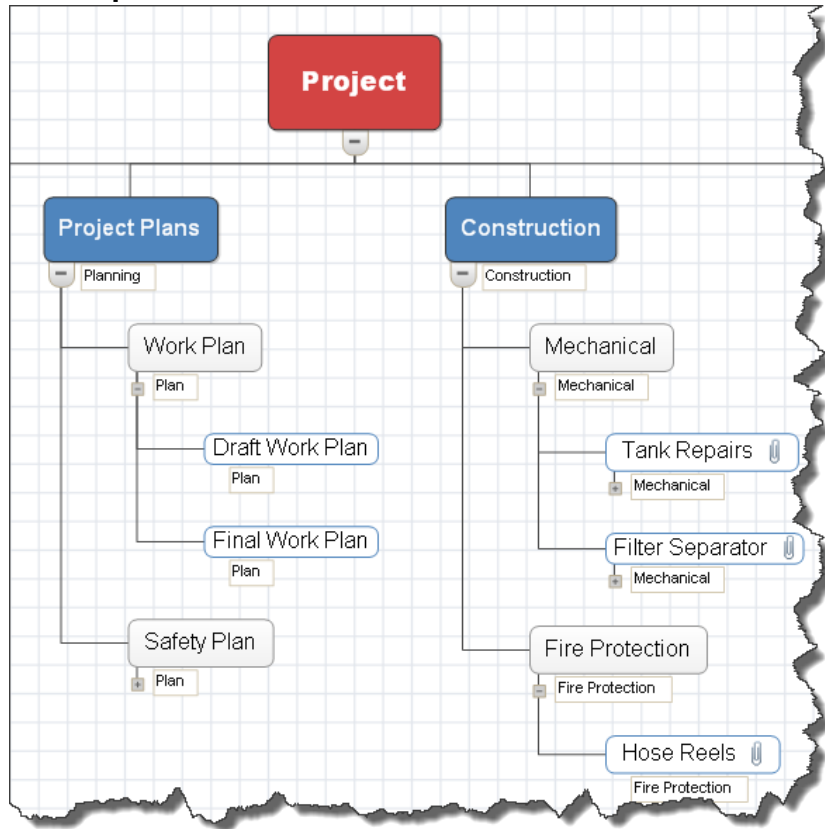


Text Note Editor

Benefit - Export content to share information with team

Key Feature – View in Outline or export to Excel

Map View

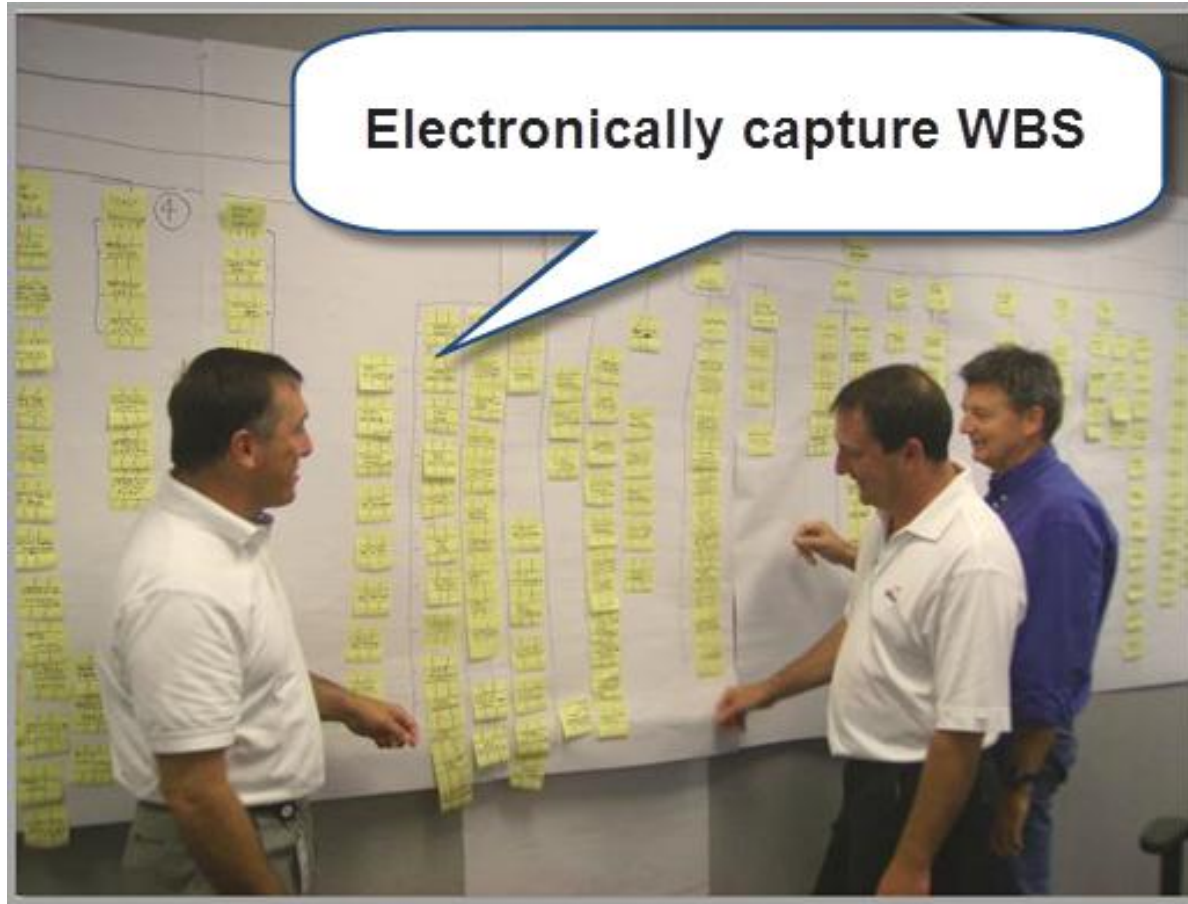


Outline View

Branch Name
Project
Project Management
[-] Project Plans
[-] Work Plan
[-] Safety Plan
[-] Construction
[-] Mechanical
[-] Tank Repairs
Site Set-up
Purge Tank Bottom
Perform Welding Repairs
NDE Testing
Client Inspection
Site Clean-up and Demob
[-] Filter Separator
LOTO
Remove Roof Hatch Cover
Drain Piping and Separator
Remove Existing Separator and Components
Install Filter Separator
Connect Piping and Components
Connect vent discharges, relief valve discharges, drains, and sample points
Radiograph Welds

Benefit – Present both map and outline views to team

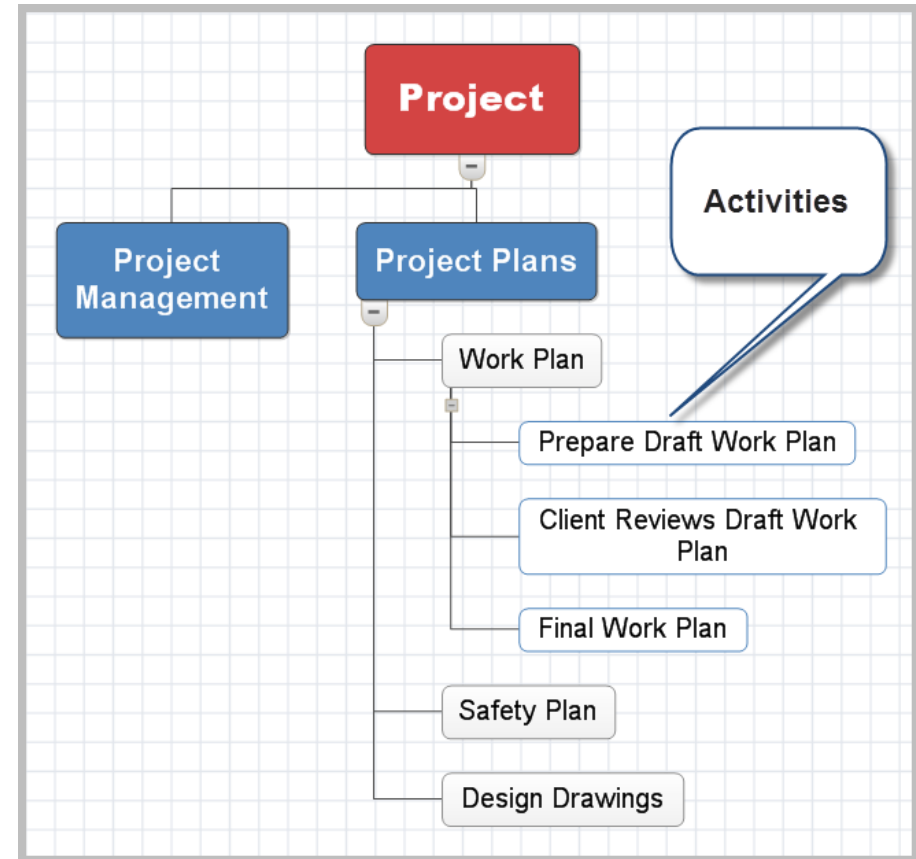
Electronically Capture Brainstorming Sessions



Benefit – Electronically capture white board sessions

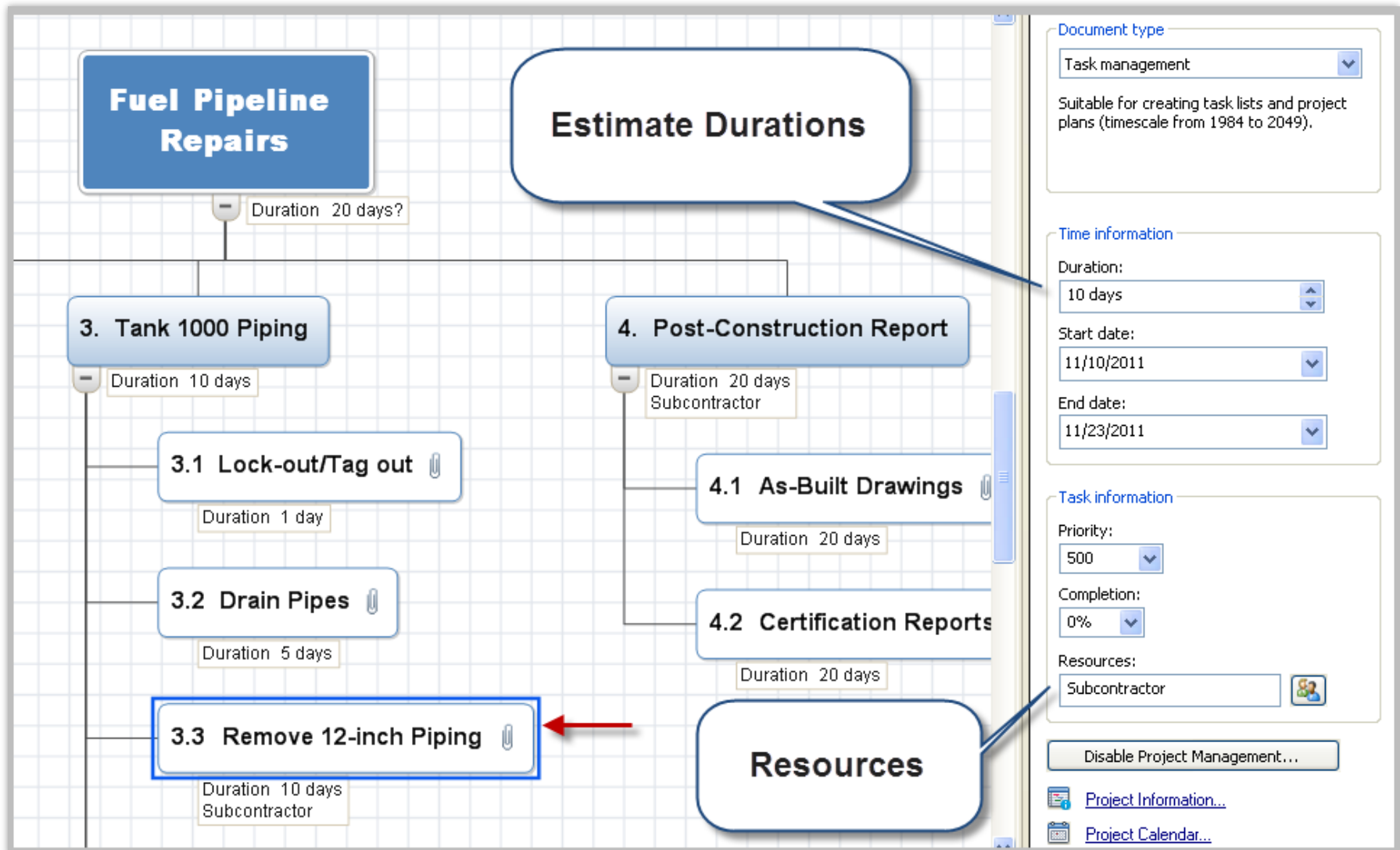
Activities Map

- ▶ Defines HOW we will perform the work
- ▶ Export Map to create Project Schedule
- ▶ Key Input for Proposal Narrative
- ▶ Creates consistency - Project Schedule and Proposal Narrative



Benefit – Leverage Scope Planning to create Project Schedule

Estimate Resources and Durations



Benefit – More effectively determine resource and durations with SMEs

Key Feature – Export to MS Project

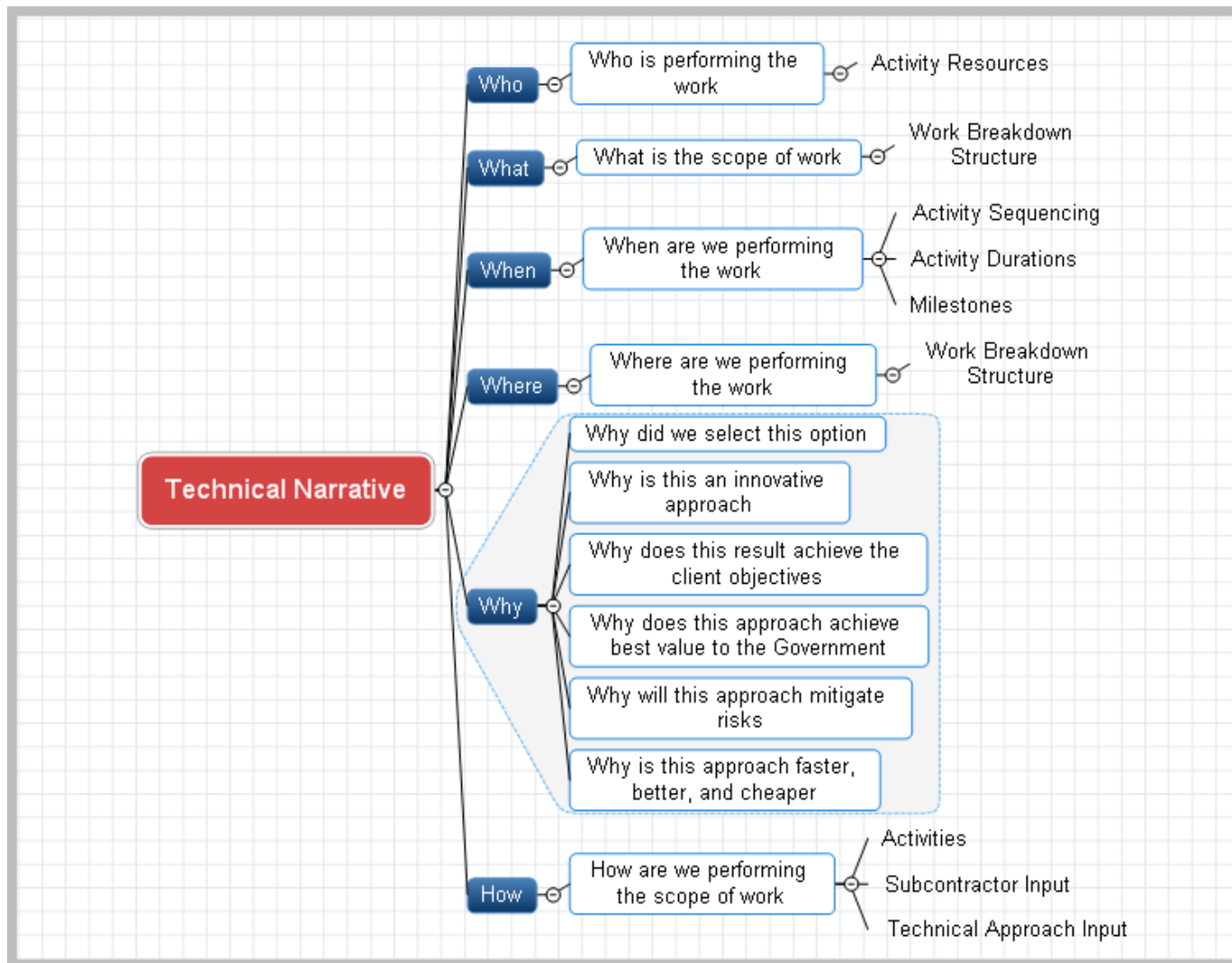
The screenshot displays the Primavera P6 software interface. The top ribbon includes tabs for Gantt Tools, Home, Insert, Review, Share, View, and Design. The main window is divided into a task list on the left and a Gantt chart on the right. The task list table is as follows:

Task ID	Task Name	Duration	Start	End	Predecessors
1	Fuel Pipeline Repairs	20 days	11/10/2011	12/7/2011	
2	1. Project Plans	20 days	11/10/2011	12/7/2011	
3	1.1 Work Plan	20 days	11/10/2011	12/7/2011	
4	1.2 Environmental Protection Plan	20 days	11/10/2011	12/7/2011	
5	1.3 Accident Prevention Plan	20 days	11/10/2011	12/7/2011	
6	1.4 Submittals	10 days	11/10/2011	11/23/2011	
7	1.4.1 Welder Procedures and Qualifications	10 days	11/10/2011	11/23/2011	
8	1.4.2 Stainless Steel Piping Product Data Sheet	10 days	11/10/2011	11/23/2011	
9	1.4.3 Crane Certifications	10 days	11/10/2011	11/23/2011	
10	1.4.4 Contractor License	10 days	11/10/2011	11/23/2011	
11	1.4.5 Materials	10 days	11/10/2011	11/23/2011	
12	1.5 Permit	20 days	11/10/2011	12/7/2011	
13	2. Tank 1000 Piping	10 days	11/10/2011	11/23/2011	
14	2.1 Drain Pipes	5 days	11/10/2011	11/16/2011	
15	2.2 Lock-out/Tag out	1 day	11/10/2011	11/10/2011	
16	2.3 Remove 12-inch Piping	10 days	11/10/2011	11/23/2011	
17	2.4 Remove 8-inch Piping	8 days	11/10/2011	11/21/2011	
18	2.5 Stainless Steel Piping	10 days	11/10/2011	11/23/2011	
19	2.5.1 Install Stainless Steel Piping	10 days	11/10/2011	11/23/2011	
20	2.5.2 Pressure Test Piping	1 day	11/10/2011	11/10/2011	
21	2.5.3 NDE Testing	1 day	11/10/2011	11/10/2011	
22	2.6 Pipe Disposal	2 days	11/10/2011	11/11/2011	
23	3. Post-Construction Report	20 days	11/10/2011	12/7/2011	
24	3.1 As-Built Drawings	20 days	11/10/2011	12/7/2011	
25	3.2 Certification Reports	20 days	11/10/2011	12/7/2011	

Two callout boxes are present: one pointing to the 'Predecessors' column in the task list with the text "Enter Predecessors in Gantt view", and another pointing to the Gantt chart with the text "Export Gantt View into MS Project".

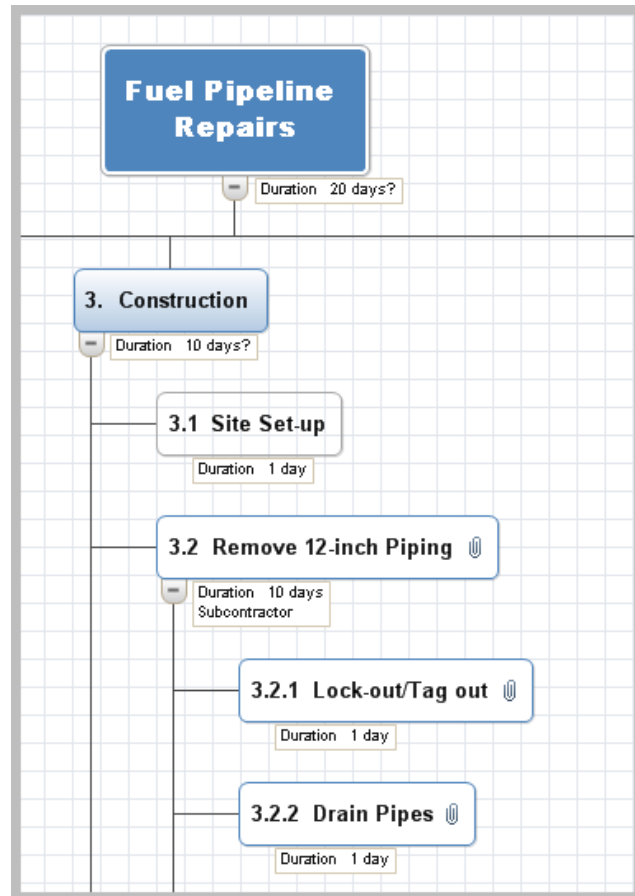
Benefit – More effectively update WBS and Activities to create Schedule

Mind Mapping Improves Writing Content



Benefit – Captures writing content input during project planning

Export Map to MS Word



Remove 12-inch Piping

2.3 Remove 12-inch Piping


Duration 10 days

Objective

Remove and dispose of 12-inch carbon steel piping to return tank system into compliance with regulations

Scope of Work

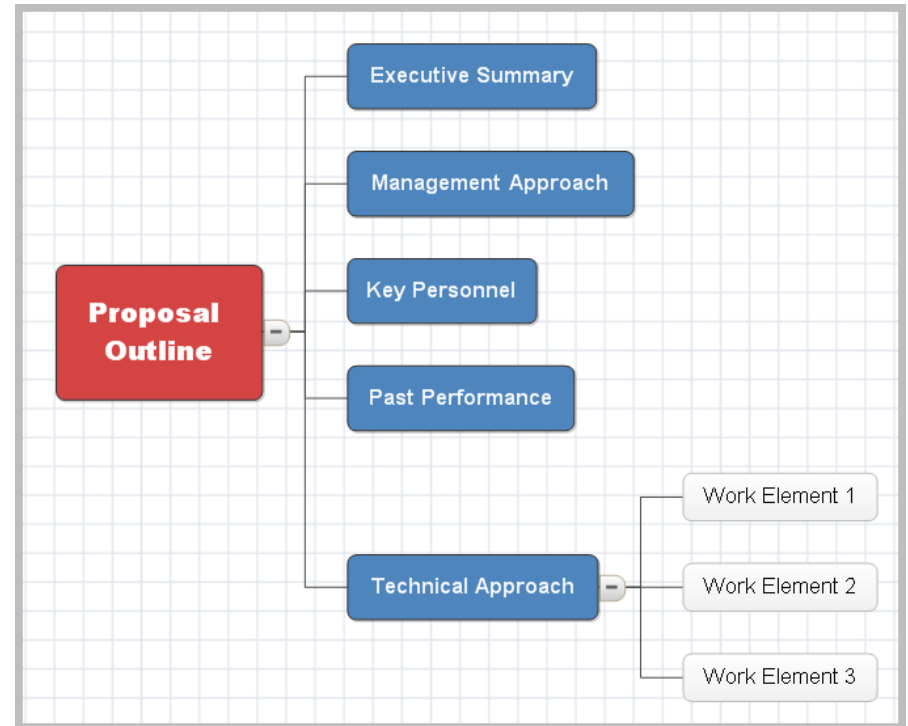
Disconnect and remove the aboveground 12-inch carbon steel piping from Tank 1000 to the Filter/Separator manifold area. Approximate length is 60 feet and includes one each of the following: ball valve, Twin-seal valve, and ClVal check valve. Install an ANSI 150 class carbon steel blank flange to piping at each end, i.e. where the Twin-seal valve is removed, and at the flange inside Tank 1000 Valve Pit (VP) where piping is disconnected.



Benefit – Narrative is consistent with WBS, Estimate, and Schedule

Create Proposal Outline

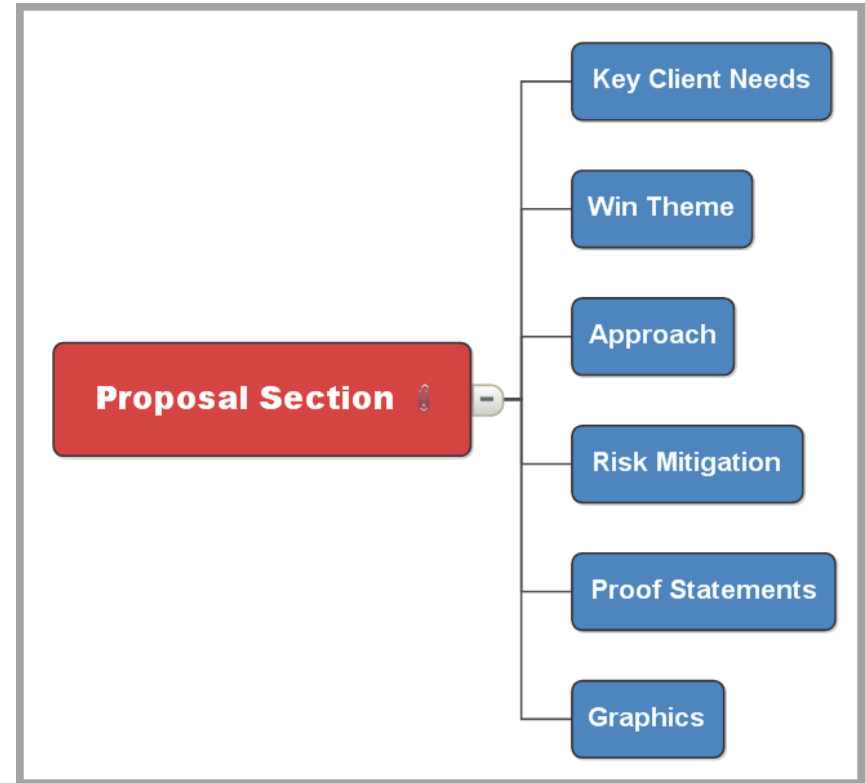
- ▶ Analyze RFP
- ▶ Create proposal map
- ▶ Brainstorm sections
- ▶ Insert text notes
- ▶ Copy relevant narrative into text editor
- ▶ Export to Word to create outline



“Answer the Mail”

Create Electronic Storyboard

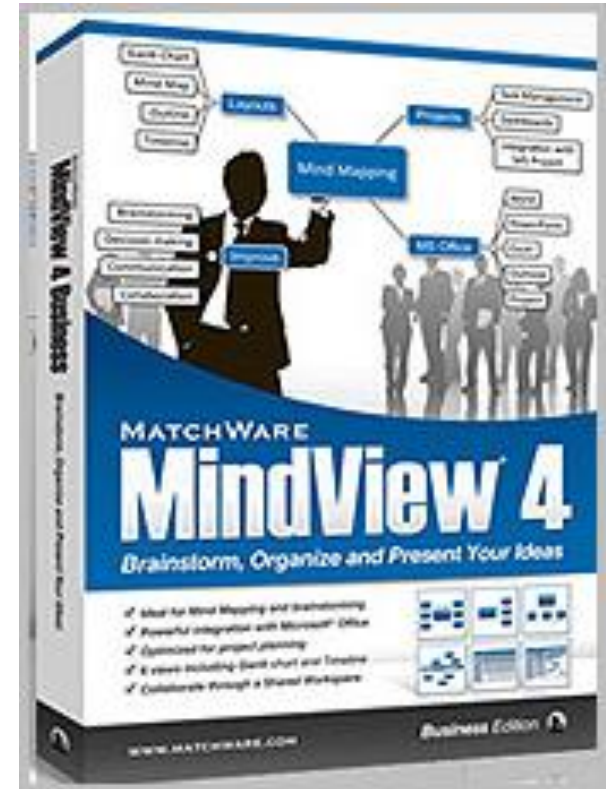
- ▶ Brainstorm Sections
- ▶ Create Sub-topics
- ▶ Enter Text Notes
- ▶ Link to Websites
- ▶ Visually Organize Sections
- ▶ Export to Word



Electronic Storyboard

Contact Information

- ▶ James J. Franklin
- ▶ 619-954-5283
- ▶ franklinpmp@gmail.com
- ▶ Matchware.com
- ▶ LinkedIn



▶ Mind Mapping Techniques to Create Winning Proposals