Proposal Metrics Dashboard

What Gets Measured Gets Done

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Topics

- **Why Keep Metrics?**

- **What Metrics Should We Keep?**

- **What is the Easiest Way to Collect Metrics?**

- **What is the Easiest Way to Report Metrics?**

- **Tips and Tricks to Building a Dashboard**

- **A Few Excel Basic Tools**

- **A Few Excel Advanced Tools**

- **Walk Through the Live Dashboard**

- **Questions**

Where to Get the Dashboard and Presentation

- **www.pgeeks.com**

- **User Name: APMP**

- **Password: 2013**

- **Download Files**

Government Proposal Automation
Developing Compelling, Compliant, & Complete Proposals

User: Password: LOGIN ▶

PROPOSAL GEEKS

Why Keep Metrics?

- **Helps YOU Recognize a Winning and a Losing Proposal Earlier than Award Date**
  - Help Increase Win Ratios
  - Helps Prioritize Proposal Activities
  - Helps with Bid / No-Bid Decisions

- **Help Proposal Team Morale**
  - Increases the Metrics on if the Team Did a Great Job or Not
  - Nothing Wrong with Losing a Race When You Did Your Best

- **Helps Upper Management Relationship**
 - Imagine Giving a Report that Says:

"Win Ratio is 95% When We Find Out About the Proposal 2 Months in Advance of RFP. Win Ratio is 10% When We Know About the Proposal 1 Week After the RFP."

What Metrics Should We Keep?

Different Categories of Metrics

- **Basic Data** *(minimum amount)*
  - Names
  - Dates
  - Numbers
  - Text

- **Key Metrics** *(maximum amount)*
  - Yes / No (understand the default)
  - Drop Down Choices
  - Formulas

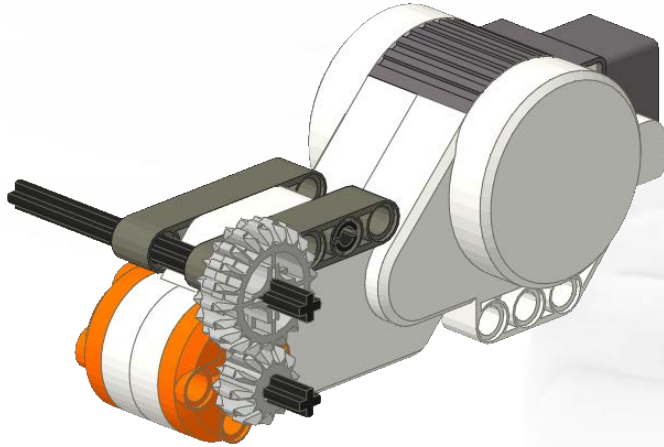Remember You Want to Be Able to Collect These in a Minimal Amount of Time
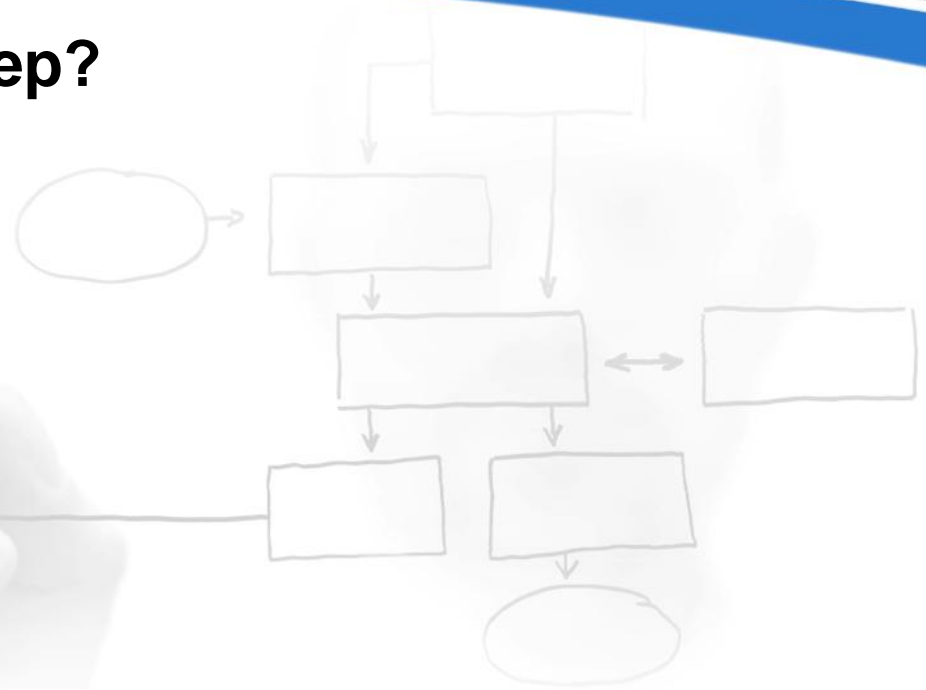
Mark White's Top Ten Metrics

- **Early Notification of RFP**

- **Capture Plan Completed Prior to RFP Release**

- **Identify Program Manager Early**

- **Compliance Matrix Completed Prior to Kick-Off**

- **Responsibility Matrix Completed Prior to Kick-Off**

- **Formal Kick-Off Meeting**

- **Formal Red Team Review**

- **Formal Schedule**

- **Deadline Dates Met**

- **Oral Proposals Required**

Other Metrics

- **Checklist for RFP Used**

- **Client Debrief Received**

- **Executive Summary Used**

- **Experience Matrix Used in the Proposal**

- **Key Personnel Matrix Used in the Proposal**

- **Identify Win Themes Early**

- **Hard Copies Required**

- **Soft Copies Required**

- **Formal Pink Team**

- **Percentage of Graphics**

- **Formal Edit**

What Parts Can

We Do Without

and Still Win?

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What is the Easiest Way to Collect Metrics?

- **Who**
  - Typically a Single Person within the Proposal Center is Responsible for the Master Collection
  - Each Proposal Manager enters their own information
    - Could have a separate spread sheet for each proposal manager
    - That information is transferred on a monthly or quarterly basis

- **When**
  - At First Assignment of the Proposal
  - At RFP Release
  - At Red Team
  - At Final Production
  - At Award

- **How**
  - Simple Excel Spreadsheet
  - Metrics go across columns
  - Proposals go down rows

Add Metric Collection to Your Checklist

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What is the Easiest Way to Report Metrics?

- **Use a Dashboard**

- **Give Them What They WANT First**

- **Let Them See Your Points Second**

- **Provide them an interpretation of the Metrics**
  - Never Expect Anyone to Interpret the Metrics the Same Way
  - Use Words Like "One Way to interpret the report is…."

- **Every Year to Leadership**
  - Based on a Proposal Center Averaging Less Than 100 Proposals a Year
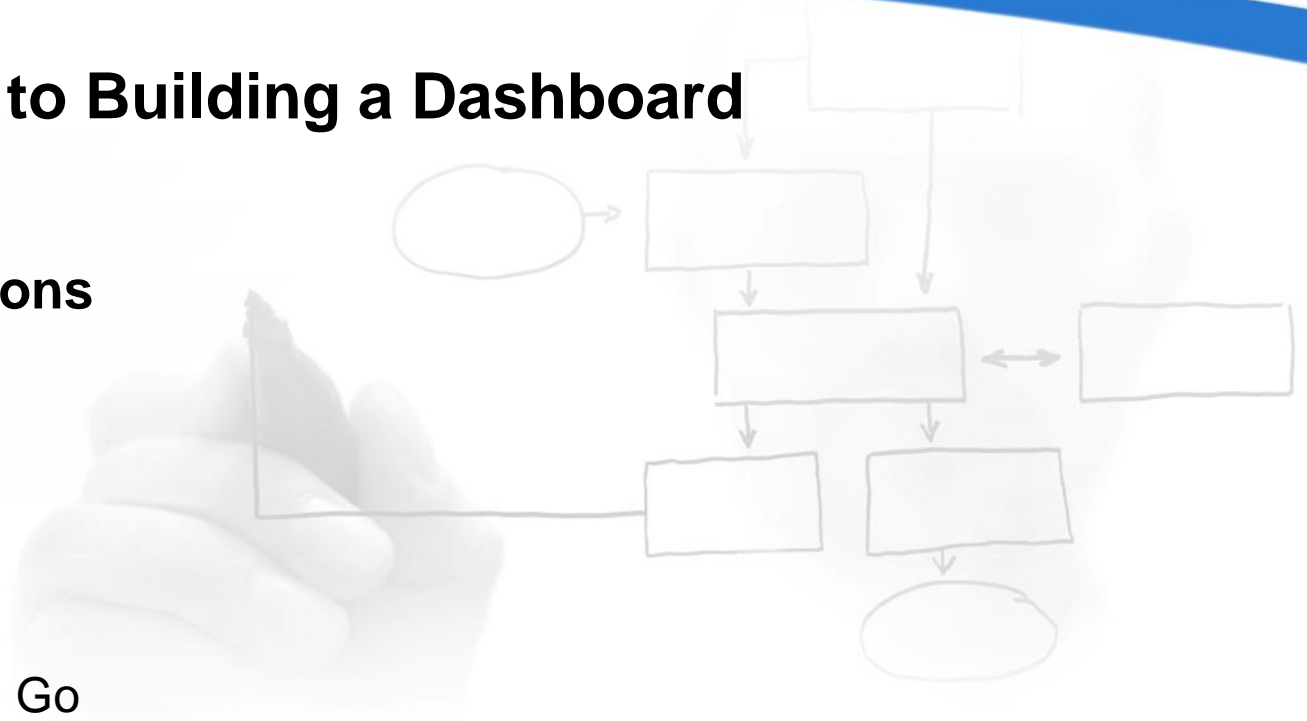
- **Every 6 Months to Proposal Team**

Tips and Tricks to Building a Dashboard

- **Naming Conventions**
  - Cells
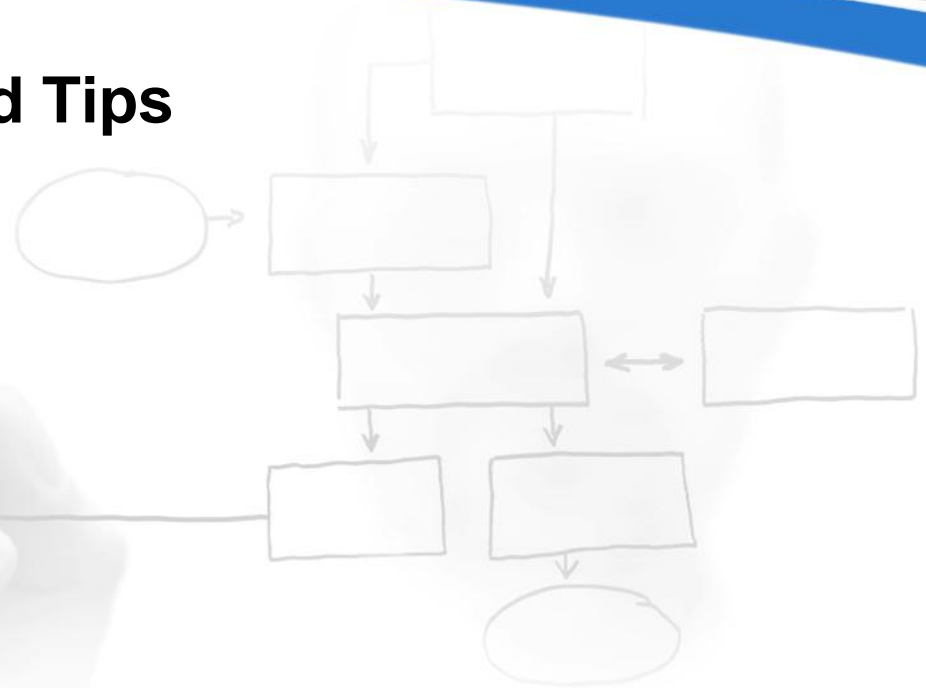 - Ranges
  - Validation Lists

- **Using Styles**
  - Build Menu as You Go
  - Color Code
  - You Can Always Change the Styles to the Same Look at End

- **Build It as If You Plan to Train People to Use It**

A Few Excel Basic Tools and Tips

- **Naming Cells and Ranges**

- **Name Manager**

- **Validation Lists**

- **Don't Format the Entire Sheet**
  - Format Sets of 100
  - Gray Line at Bottom of Formatted Set
  - Archive at 500 or Sooner if Applicable

Name Manager

- **Use Consistent Prefixes for Sorting and Using in Formulas**
  - From To
    - Small From = S_F
    - Small To = S_T
  - Result
    - R_RFP
    - R_Due
    - R_Size
  - Vlist_

- **Keep Range Ends Consistent**
  - E104
  - M104
  - O104
  - P104

A Few Excel Advanced Tools and Tips

=SUMIFS(R_Rev,R_Status,"Win",R_RFP,">="&From,R_RFP,"<="&To)

=COUNTIFS(R_Status,"Win",R_RFP,">="&From,R_RFP,"<="&To)
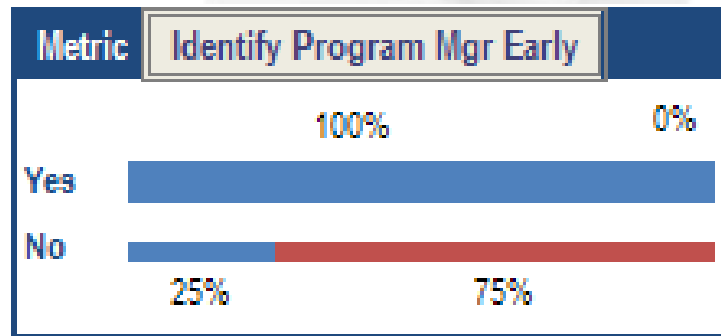
- **Advanced Formulas**
  - SUMIF
  - SUMIFS
  - COUNTIF
  - COUNTIFS
  - Use Search and Replace with Selection to Edit Formulas

- **Advanced Formulas for Formatting**
  - Banded Rows when Filtered

- **Pivot Tables**

- **Charts On Top of Data**

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Walk Through the Live Dashboard

Drop Down Choice On Hover

When Yes, We Win 100%

When No, We Win 25%

Metric	Identify Program Mgr Early

100% 0%
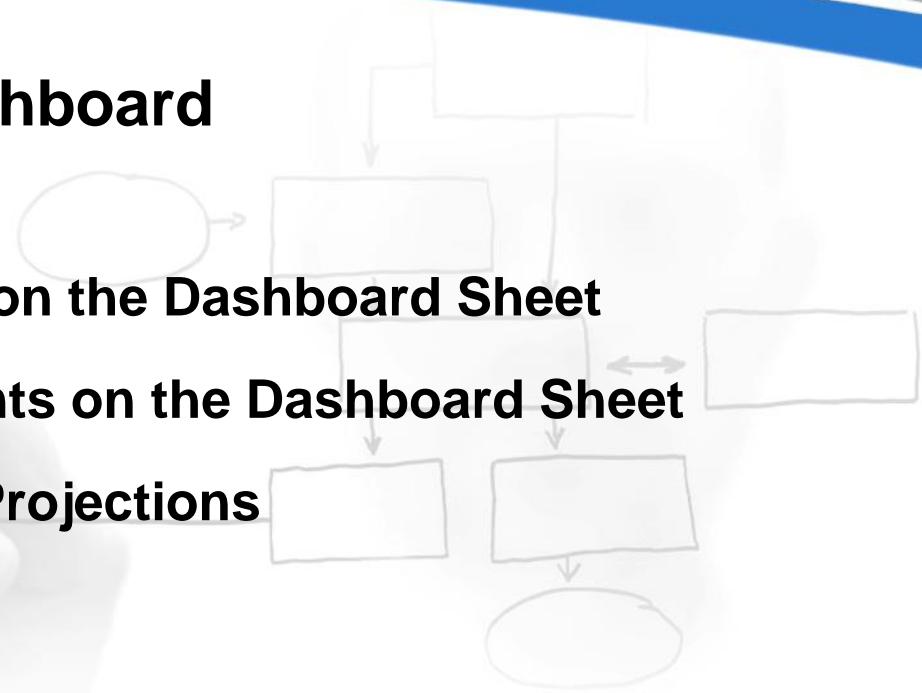
Yes

No

25% 75%

NOTE: At time of design. Excel bug with 100% stacked charts with numbers between 83 and 90%. Graphic will appear wrong.

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How to Customize Your Dashboard

- **Change the From and To Dates on the Dashboard Sheet**

- **Change the Min and Max Amounts on the Dashboard Sheet**

- **Change the Factor Amount for Projections**

- **To Change to Your Own Metrics**
  - Don't Change Formulas
  - Don't Change Range Names
  - DO Change the Metric Name on V Lists Tab
  - DO Change the Column Title (Purple) on Proposal Metrics Tab

Questions