



Nuggets of Wisdom: ***Solutions to Proposal's Toughest Problems*** *for Proposal Leaders & Process Champions*

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So, You Think Your New Business Proposal Effort is Going OK

- Exec Sum draft prepared early
- Schedule, outline and assignments ready at kickoff
- Smart people on proposal team
- Reasonable proposal budget
- Short fuse proposal...straight to first draft (save time)
- Meeting initial proposal milestones
- Peer review planned

...yet, somehow, it takes so little for the proposal to go “sideways”

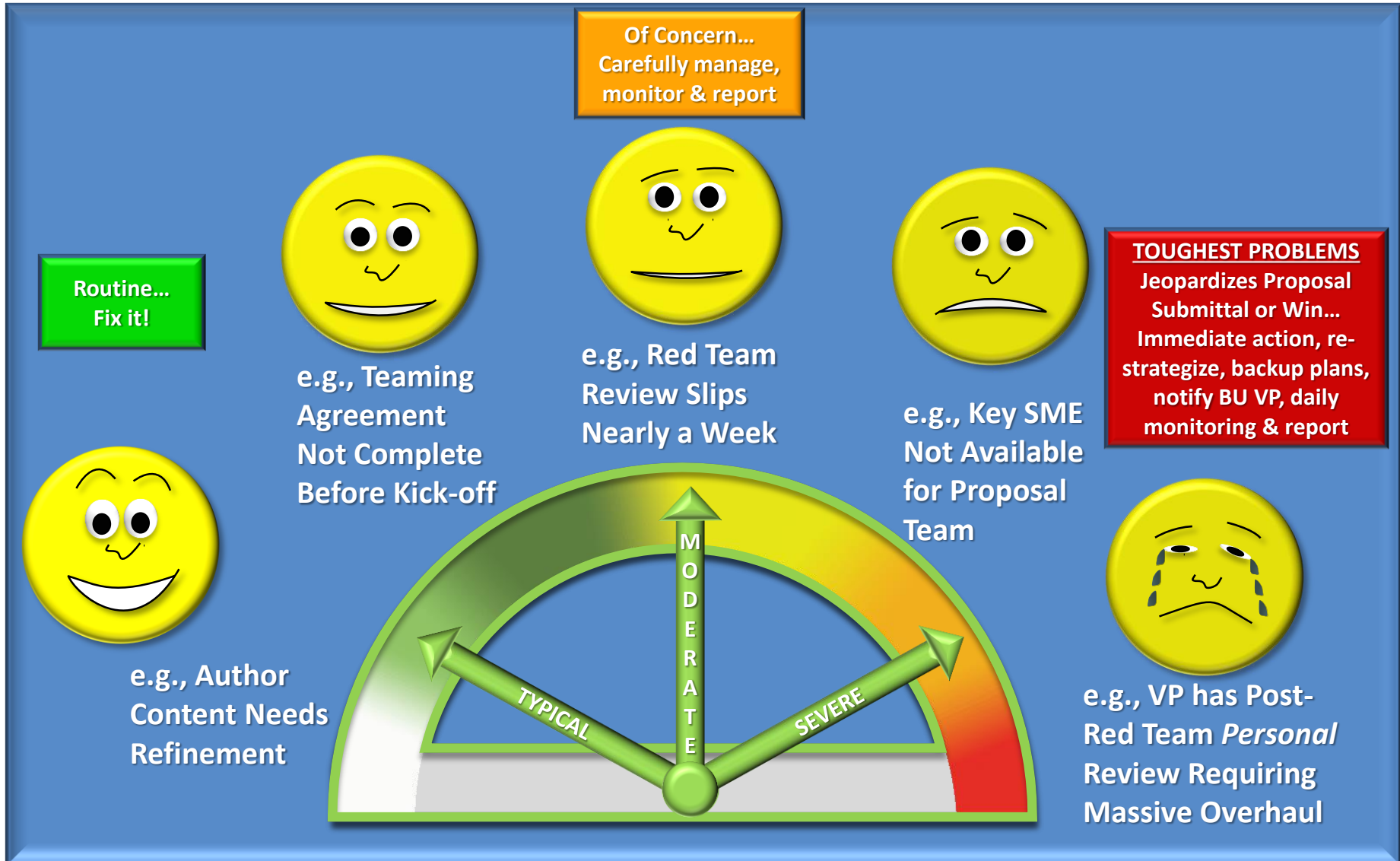
Ever Experienced the Proposal-Equivalent of This?



Who Has Experienced...

- ...no capture work, yet still bid?
- ...B/NB decision lingered until submittal?
- ...proposal manager inexperienced?
- ...kickoff held immediately upon receipt of RFP?
- ...competitor offerings??? ...*clueless*
- ...PTW ...*what's that?*
- ...offer/solution not final most way through proposal?
- ...multiple proposal iterations?
- ...themes developed *after* writing the proposal?
- ...exec involvement only *after* Red Team review?
- ...no final proposal edit...shipped anyway?

Span of Proposal Challenges



Why This Presentation?

Proposal professionals focus heavily on *process, tools and templates...*

- **Industry “standard” capture/proposal process**
- **Capture/proposal education sessions at APMPs annual Bid & Proposal Conference**
- **Vendor software applications, tools and templates**
- **APMP regional chapter educational events**

**Sound knowledge of an effective proposal process is a must.
*Mastery of effective execution (how well) is the key!***

Proposal Management Key Competencies

1. Ability to understand RFPs; identify all requirements and develop a compliance matrix and an annotated outline that structures the proposal to be compliant
- 2. Strong leadership, organizational, planning, problem-solving, and interpersonal skills.** Ability to perform in a fast-paced, deadline-oriented work environment and to successfully execute many complex tasks simultaneously. Excellent time management skills.
3. Ability to manage large and small teams, both in person and virtually, including external team members and subcontractors. Manage activities of SMEs; authors, graphics, publications and production personnel and others assigned to proposal team
4. Ability to provide instructions and team guidance to all proposal contributors, as well as graphics concept development support. Ensures development and submission of compliant, competitive and compelling proposals; proposal accurately reflects win strategy, key themes and appropriately conveys the solutions for each action
5. Project management capabilities to meet milestones on time and within budget, including resource allocation/staffing, budget formulation, schedule adherence, action item tracking, and providing status to executive management

**Project Management skills,
and associated details.**

Koger's Axioms

[Axiom...a self-evident truth]

- 1. Effective proposal leadership is a lot like defensive driving... you must think about what can go wrong, in advance; proactively develop your strategy and plan to avoid problems in the first place.**

**Problem avoidance is *always*
the best approach!**

2. **Proposals involve a myriad of dynamic elements (e.g., people's availability, effort, meeting deadlines), the majority of which are *not under your direct control*.**

...your most effective tools are a positive leadership style and ability to motivate and influence. The ability to transform a highly dynamic proposal effort into a more stable one is the mark of an effective proposal leader.

Better yet, keep it smooth from the start!

3. Should the unexpected occur, effective proposal leaders are the ones who can adapt, develop best corrective action(s) and still achieve the overall objectives...on-time delivery of compliant, quality, compelling proposals.

Most Valued Attributes

- Adaptable/Flexible
- Proactive
- Resourceful
- Ability to “reset”
- Motivator
- “Sharpens the saw”
- Solution-oriented
- Self-energized
- Skills are scalable
- Tenacious
- Aspires for excellence
- Positive Attitude
- Force Multiplier
- Persuasive
- Eff. Communicator

The Five Dysfunctions of a Team



*OK Steve, so what about
Proposal's Toughest Problems?*

Who's Got the Time?

Problem: “Must Win” RFP arrives and you find out that you have 3 ½ weeks before the due date. Everyone knows it normally takes significantly longer.

Issues:

- Prior, similar proposals have taken 5-6 weeks...”can’t be done!”
- Automatically ask the customer for a due date extension
- Holding kickoff immediately, upon receipt of RFP
- Poorly detailed proposal development schedule
- No complete annotated outline or compliance matrix
- Assignments/deadlines unclear
- “No time for storyboarding!”

Best Practices:

- “A Team” if you can; collocate if possible
- Prepared before kickoff (10 % delay rule)
- Pricing “long pole in tent”...separate kickoff
- Daily, concise tagups...accountability
- Solve issues upon first awareness
- Artwork...“long pole”...*Hall of Shame*
- Schedule/annotated outline complete and correct
- Assignments/deadlines understood
- Storyboarding critical...one iteration!
- Emulate customer’s review process/scoring
- “Grease skids” for mgmt. review/approval
- *Only* ask for extension as a last resort



You Call This a Team?



Problem: Proposal Manager not available; you are missing key contributors/ SMEs. Commitment of some team members is weak; participation intermittent.

Issues:

- Assigned/logical proposal manager is unavailable
- Subject matter experts unavailable or too much “on their plates”
- Someone with nothing to do was provided instead

You Call This a Team? (Cont'd)

Best Practices:

- Cadre of qualified proposal managers...use them interchangeably
- Proposal manager's style, attitude and enthusiasm sets the stage; motivation is key
- Identify key proposal team members, by name, at B/NB decision... obtain their manager's commitment
- Release anyone who is not needed or refuses to contribute
- Manage efficiently...bring people in for needed contribution, then release
- Proposal process efficiency (BD-CMM)
- Technical writers interview/write for busy contributors

Your Price is *Outasight!*



Problem: Your price is *stratospheric*...out of the competitive range.

You're almost certainly going to lose, and "losing by price" has happened many times before.

Issues:

- No/little insight into customer's budget
- No/poor intel on competitors' offerings
- Inadequate capture planning...no capture strategy
- No process/discipline to determine PTW
- SOW & WBS missing, incomplete or poorly developed
- Price elements unsubstantiated; lack solid rationale

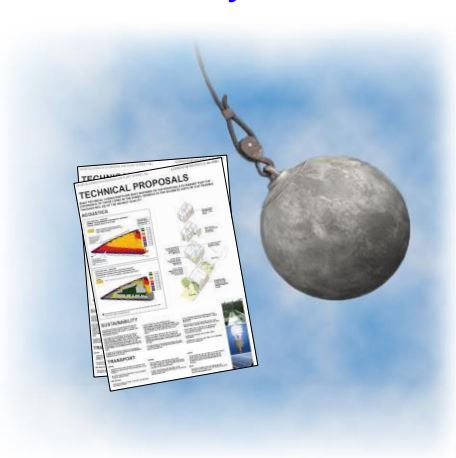
Best Practices:

- Relationship with customer is paramount
- Good performance on customer's existing programs is critical...make use of CPARS (Federal only)
- Gain insight into customer's project budget
- Research key competitors' offerings
- Prepare capture plan & strategy
- Ensure clear business offer/technical solution
- Determine PTW; Black Hat is better
- Prepare clear/complete SOW & WBS
- Back-up pricing elements with solid BOEs
(even if for internal documentation)

Post-Red Team Support

(Support that is too late, or that you really didn't want)

Problem: BU/key executives don't attend kickoff; participate in reviews. "Rip" the proposal apart after red team. Nearly a start over.



Issues:

- No BU executive support *during* proposal development
- Bad timing...uninformed/cold start at the end
- "Wasting my time" unless proposal is final
- Too late for massive overhaul; high stress on team
- Put their "mark" on the proposal...ego

Best Practices:

Important opportunities *must* have upper management's support and involvement, *and it must be apparent...*

- “*Importance of this opportunity*” talk at kickoff...builds morale; strengthens team commitment
- Reviews capture plan and contributes to development of proposal plan/strategy, before kickoff
- Attends or otherwise contributes at key formal reviews (e.g., storyboarding, red team)
- Periodic status updates by Proposal Manager
- Fields serious issues (e.g., needed resources, resolve political log jams, etc.)

“End Game” Problems

Problem: Serious issues during proposal production, shipping and delivery that jeopardize on-time receipt of the proposal by your customer.

Issues:

- Copy capability breaks down
- “Tweaking” authors burn into production time
- Customer provides *wrong* delivery address
- Delivery provider loses package/fails to deliver on-time
- Package arrives at customer’s central dock; not at designated “proposal room”
- Send proposal too early; customer issues amendment or extends due date
- Package delivered to random customer employee. No acceptance receipt/internally lost



Best Practices:

- Schedule margin for end game; enforce!
- Schedule large production jobs
- Double-check shipping labels/addresses
- Attend tagups to monitor content status; no surprises!
- Arrange alternate production location (intra-company, Office Depot, UPS Store, etc.); remember non-disclosure agreement
- Use main and 2nd *simultaneous* delivery methods, plus backup
- Use company rep. near customer...hand deliver
- Ship proposal to arrive no more than 2-3 days early

In Summary

- **As a process champion, your leadership skills and approach are paramount in achieving success with your proposal teams**
- **Problem avoidance is *always* the best approach!**
- **Your most effective tools are a positive leadership style and ability to motivate and influence**
- **Sharpen your ability to problem-solve, adapt, and develop effective corrective actions**

Thank you!

Questions?



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