

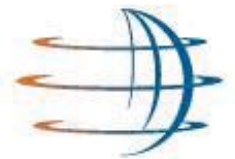
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Tailoring the Business Development Process: The Shipleys 9.6

How to Adapt Processes for Quick Turn Responses

Ed Alexander, PPF.APMP

Vice President, Shipleys Associates



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Why Plan?

“The wonderful thing about the absence of planning is that failure comes as a complete surprise and is not preceded by long periods of worry & stress.”



Keys to Winning

Focus on the Customer



Early Planning



Tailor Your Process

- The APMP Accreditation **Syllabus** requires that Foundation-Level Certification Candidates should:
 - Understand and tailor proposal tasks to suit the proposal
 - Understand internal processes
 - Be able to assess client timetables and estimate the resources required to execute the proposal



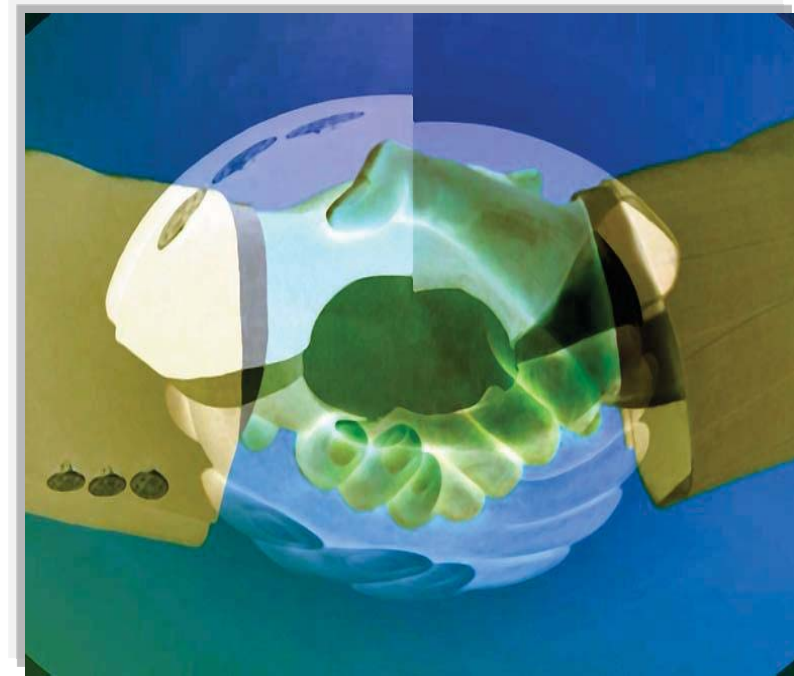
Tailoring Tasks to the Proposal

- Do it and do it early
- Do it every time and at every new stage in the process
- Don't use it as an excuse to cut corners - better to 'No Bid'
- If you start late in the process, go back and examine what you have missed and decide what you need to do
- Maximize parallel tasks; minimize sequential tasks.
- Make the level of detail reflect the size and complexity of the proposal.



Selected Yardsticks of Companies That Produce Winning Blue Proposals

- Well-defined business capture process that is flexible to meet different opportunities
- Discipline to adapt the process and make phase reviews/steps work and not fill every box with an “X”





Agenda

- 96 to 9.6—a 10% solution
- Some medium slicing and dicing to meet deadlines
- Quick Capture
- 10/30/60
- 10/30/90
- Top 10: A worst-case scenario

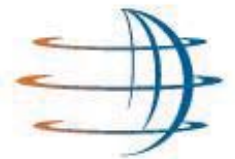


96 to 9.6 Agenda



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Introduction



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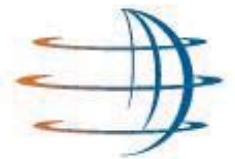




What RFPs and Squirrels May Have In Common



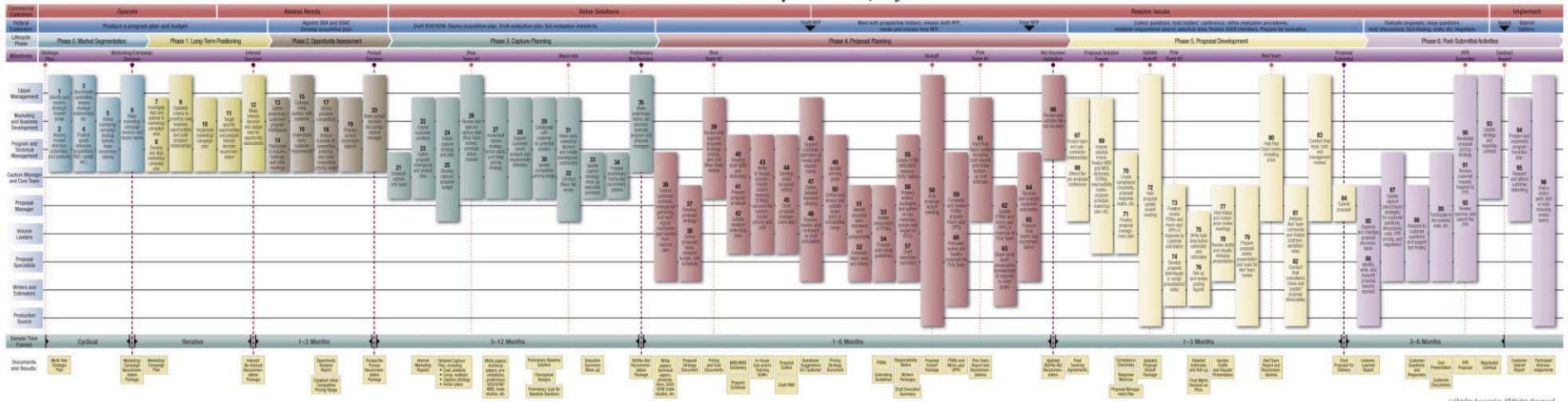
Monkeying Around With Process Tailoring





Let's monkey around with this

Business Development Lifecycle



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Some Obvious Concerns

96 Steps Are Too Many for Streamlined Procurements





Some Obvious Concerns

How Much Can I
Remove and Still Have
a Viable Process?





I Know . . . We Need a New Process!!

- The one we have is too cumbersome
- No one can do all that in a week
- The people who thought that up never envisioned today's proposal environment
- Storyboard! The proposal is only 25 pages long ... you must be kidding





But Be Careful What You Throw Out

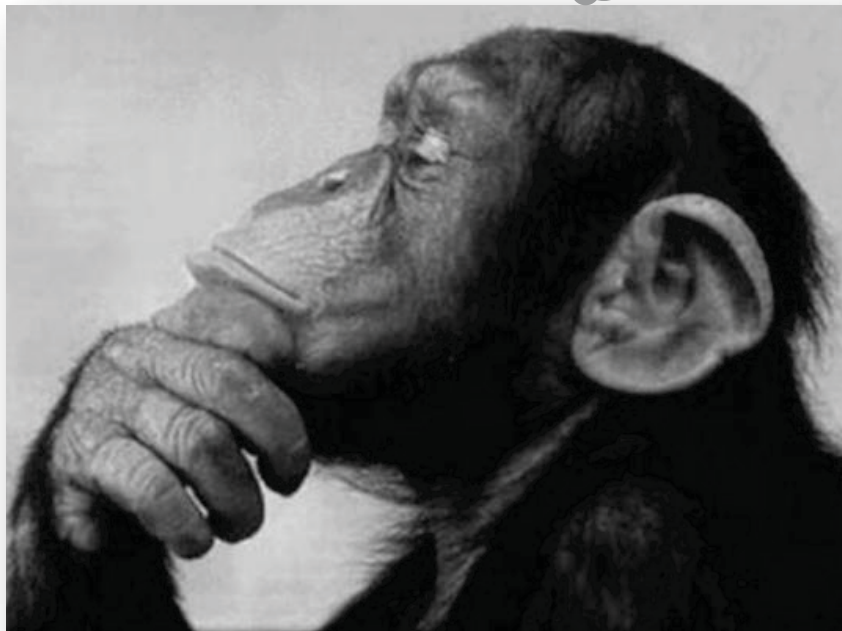


- Too often, “tailoring” is only throwing out things users don’t want to do
 - Gate reviews
 - Storyboards
 - Color teams
- Buyers still buy based upon your solution and price. Can their quality survive the cut?



So?

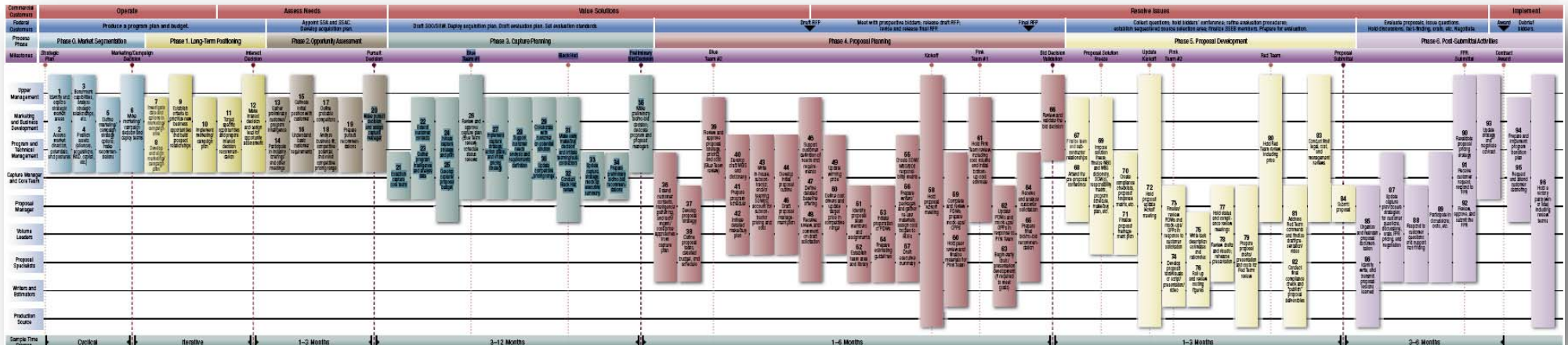
Where Do I Start?



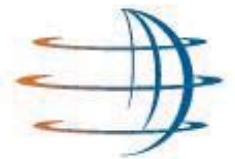


Here's An Idea . . .

- We have an RFP, so just start there! Right?



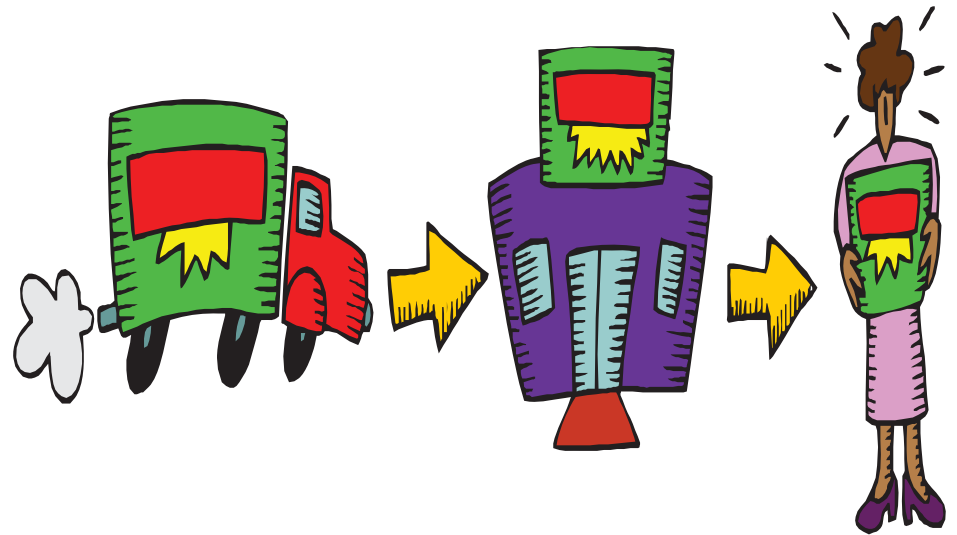
Protecting Good Process Benefits





What a Good Process Does

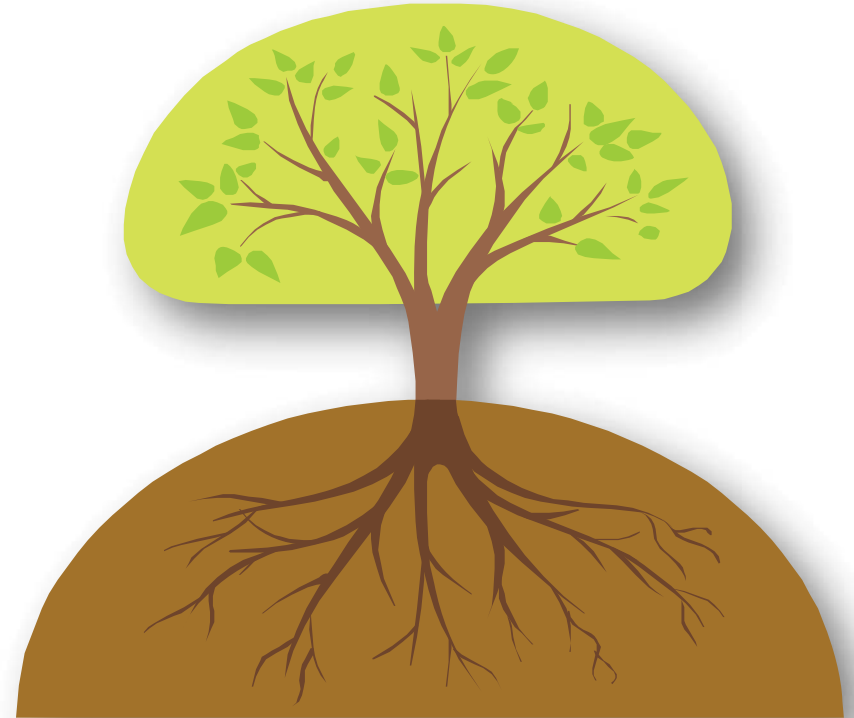
- Emphasizes planning to minimize risk
- Aligns with the buyer to improve customer focus
- Collects analysis to support decision making
- Relies on team reviews to drive collaboration



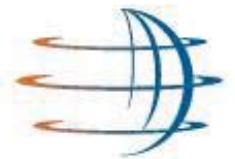


What A Good Process Does (Cont'd)

- Discourages heroism
- Flexes to fit the occasion
- Institutionalizes best practice
- Maintains the “big picture” with rational approaches to tasks
- Suppresses a “features checklist” mentality in favor of benefits driven solution



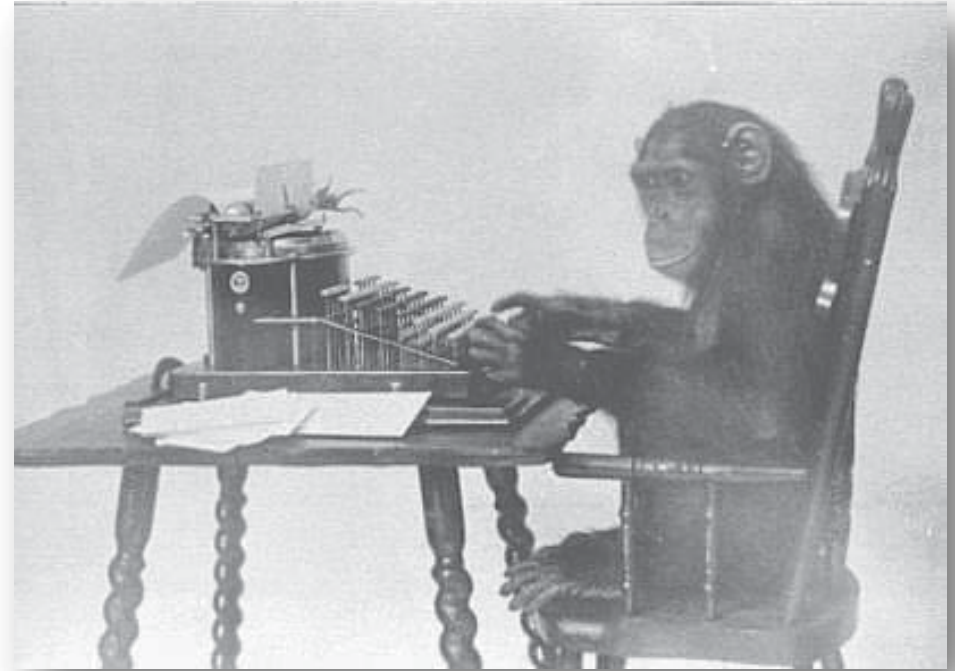
Judicious Tailoring





What Are We Trying to Create?

- A compliant, responsive proposal that BEST meets the buyer's objectives
- We can't get there by accident!



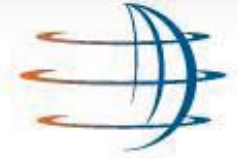


Where Do You Think We Should Start?

Scan your 96-step chart and see what you think

- The next slides provide some potential answers
- THE REAL answer comes from your organization and your process

****There is no “same thing for every time” Hawaiian-shirt solution that will work every time for everybody!!**

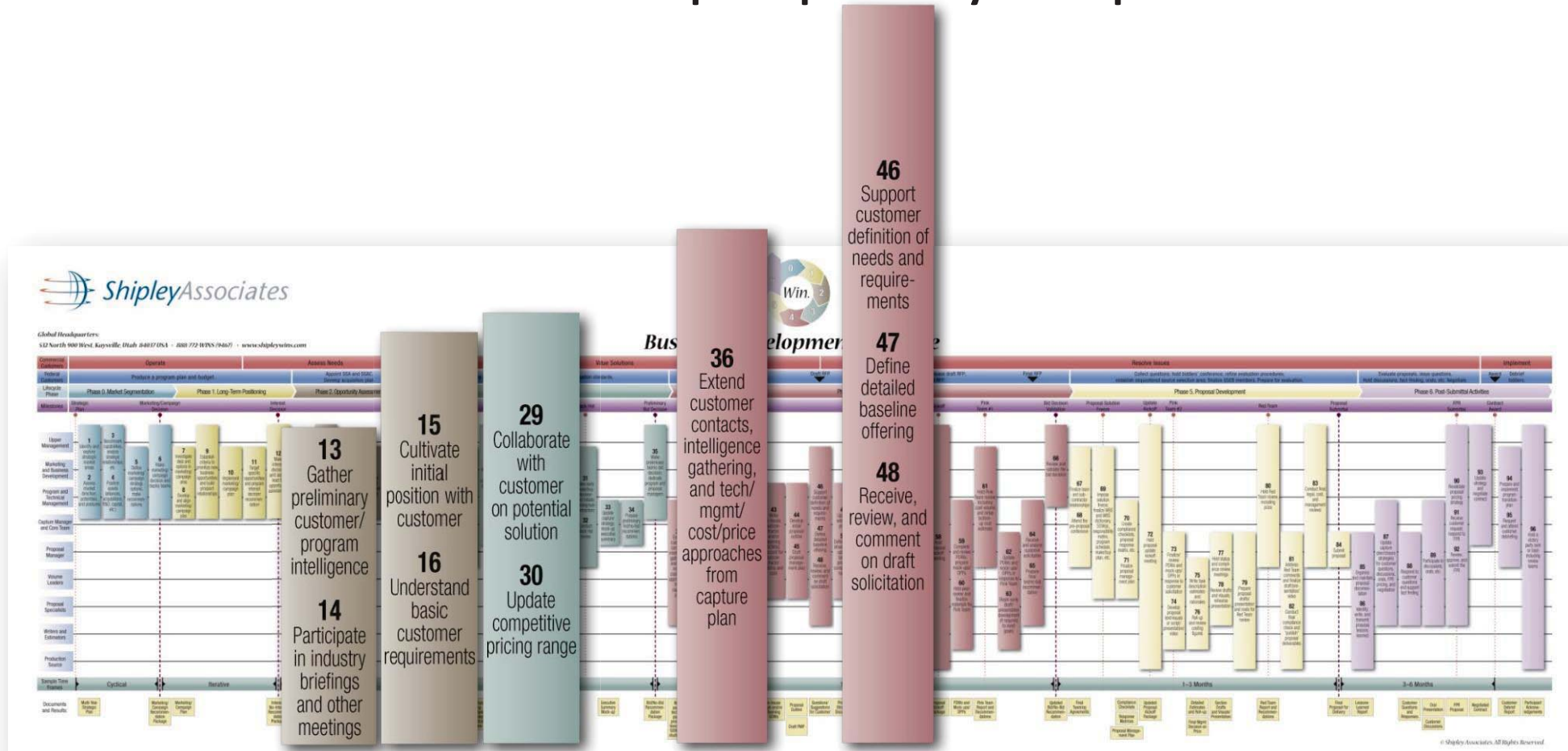


We Need A Win Strategy

Strategy = Action

To improve either the reality or the buyer's perception of reality about your offer

1. Know the customer and their perception of you. Improve it!

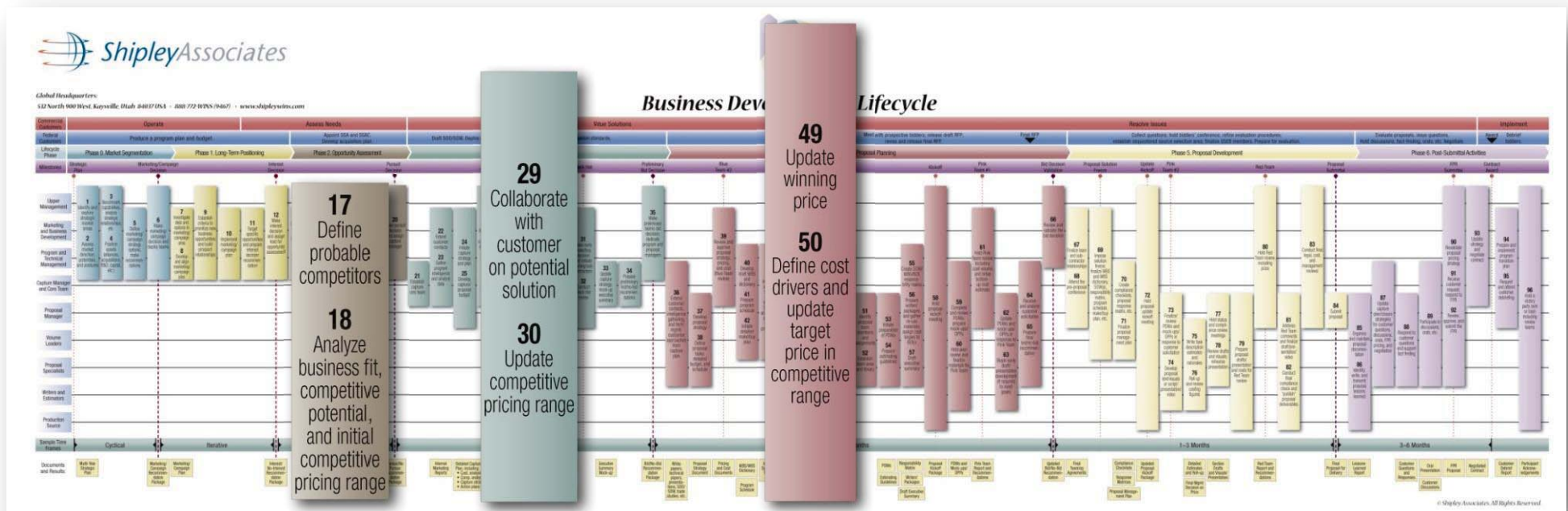




How Your Competitor Is Going to Beat You

Nothing new here, but are you taking it into account?

2. Assess your competition

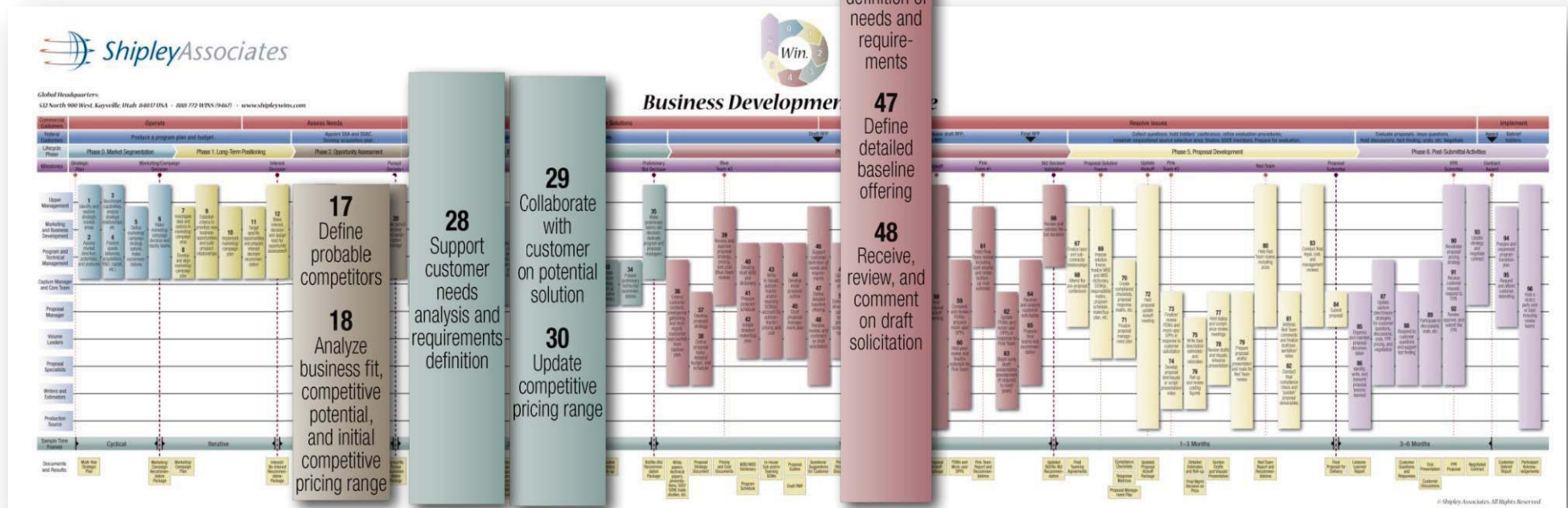




Understand the Real Requirement

Is it clear to you what the buyer is buying and the benefits he wants and needs?

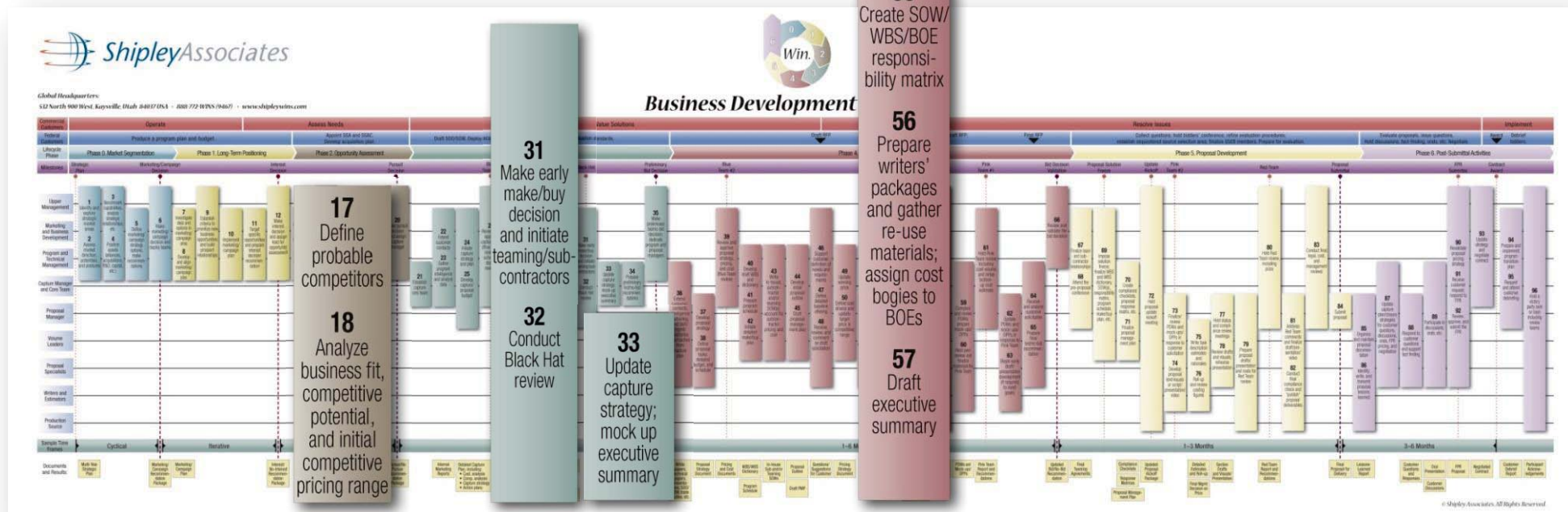
3. Understand the customer's hot buttons and the problem they're trying to solve ... read more than the solicitation and the customer's website!





Make a Bid/No Bid Decision

- Challenge all the assumptions you've made about the customer, your competitors and your own company and solution to confirm that you're likely to win and execute profitably. If you can't confirm, it's never too late to No Bid.

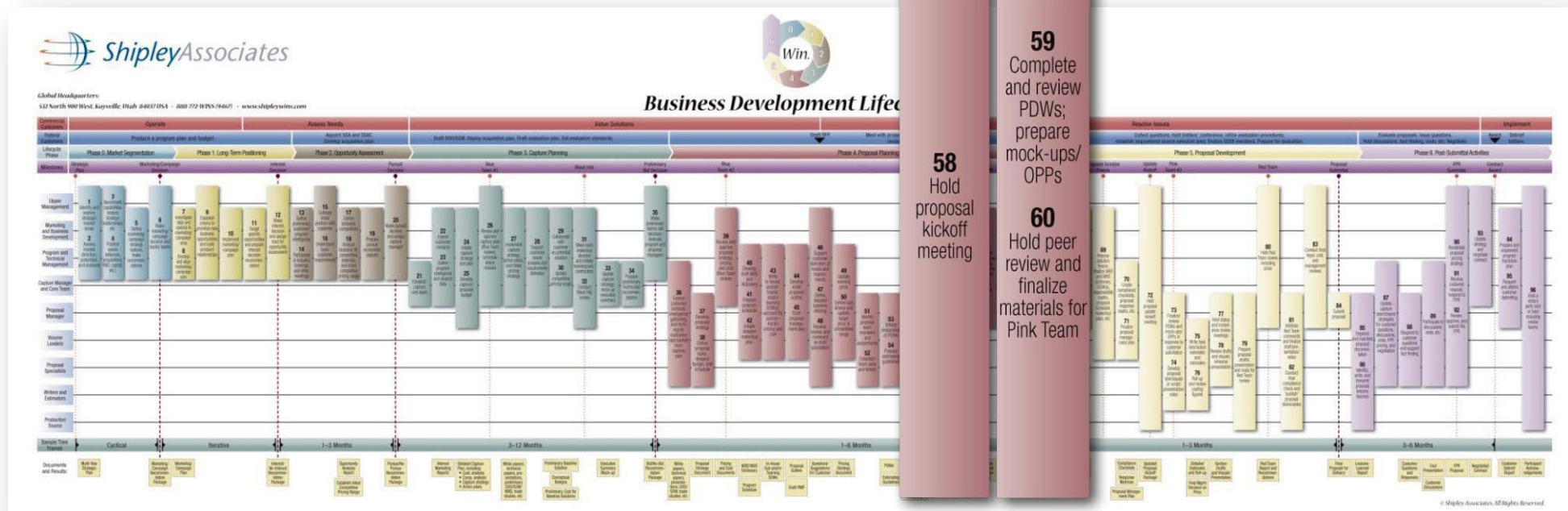




Magic Happens!

When confronted with the realities of the customer, the competitors, and your own abilities to address the real requirement, there are seldom lots of viable solutions.

- 5. Gather your team (if any) and document your win strategy, pricing bogey, ghosting ideas and draft solution outline.**

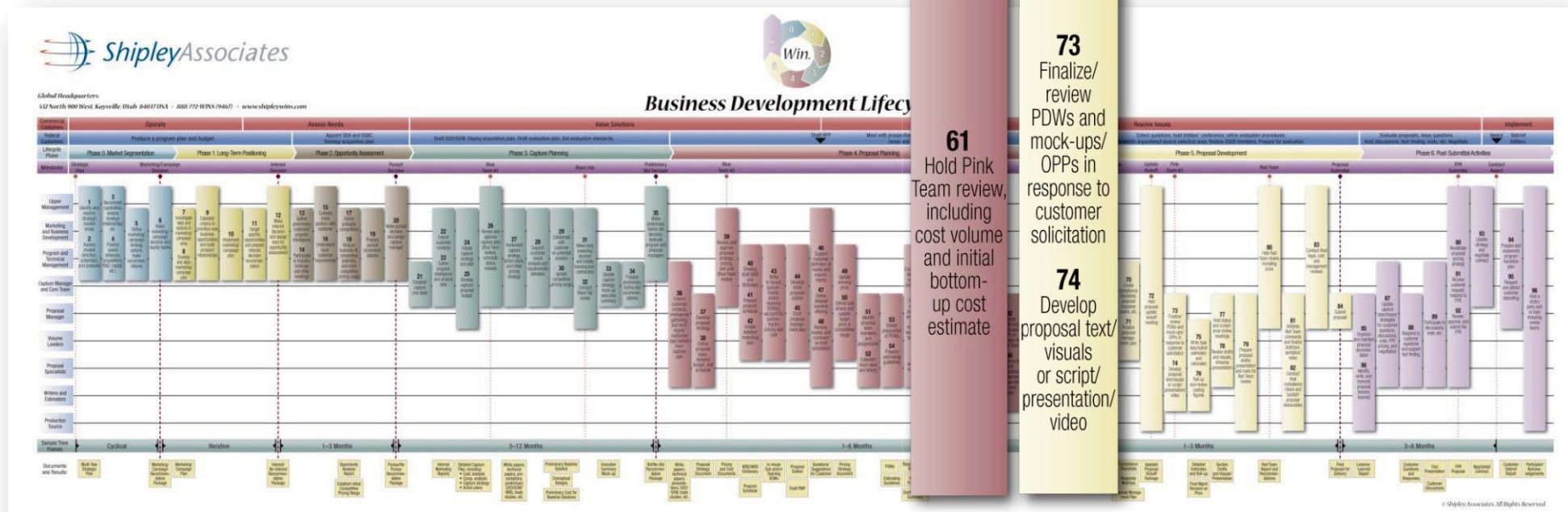




Socialize

This is what's called a Pink Team on big proposals. By this time, you are about 1/3 of the way through your response process

6. Float your plan with someone outside the proposal whose ability you respect

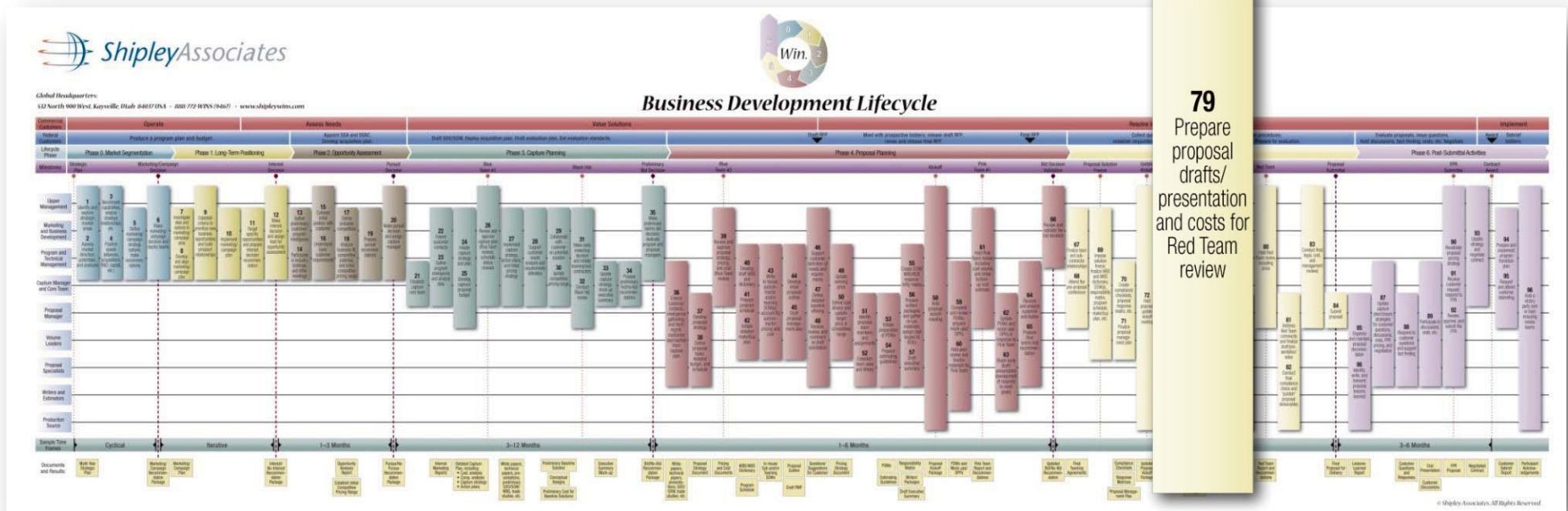




Now You Can Write

With your “Pink Team” comments and validation in hand, follow the plan you made and draft the proposal. If you planned well, you won’t need to draft again.

7. Prepare a final review copy

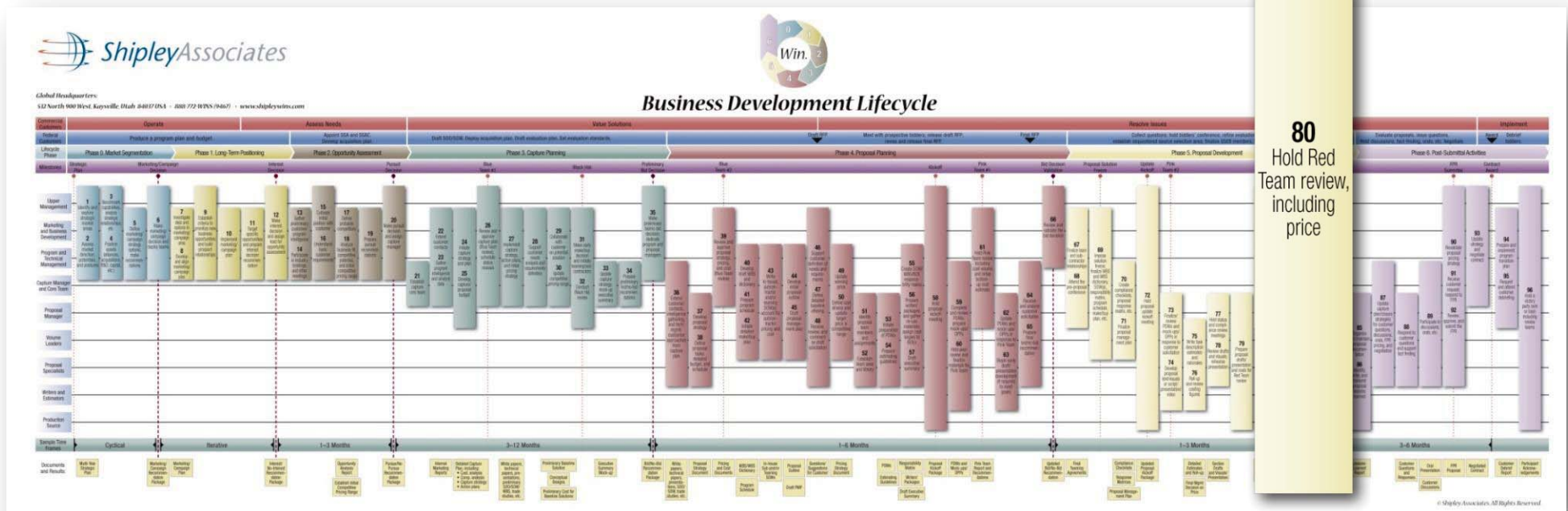




Independently Evaluate the Draft

This is the equivalent of a Red Team on a big proposal. Have someone not involved in the proposal read your solicitation while you're drafting and then score the draft by the evaluation criteria. You should be approximately 2/3 of the way through your schedule now.

8. Simulate the customer's evaluation

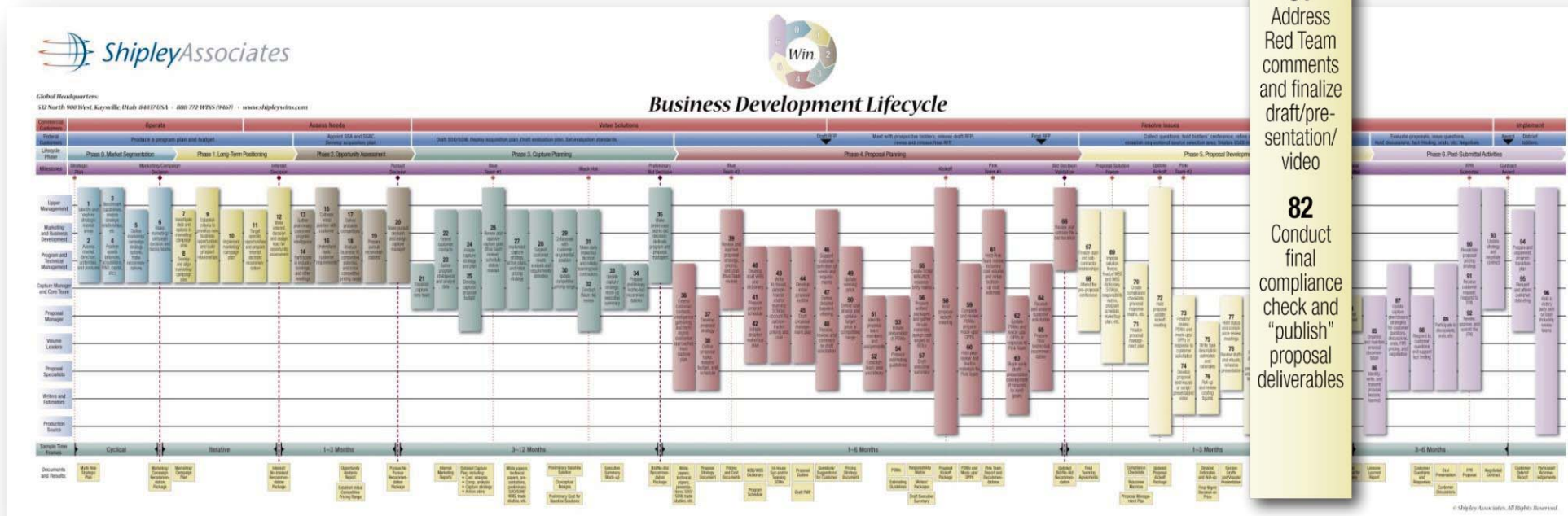




Address Needed Changes and Gaps

This is the point on a large deal where all but the very best writers go back to their offices and a handful of folks finish.

9. Respond to the evaluation, polish and publish



81 Address Red Team comments and finalize draft/presentation/video

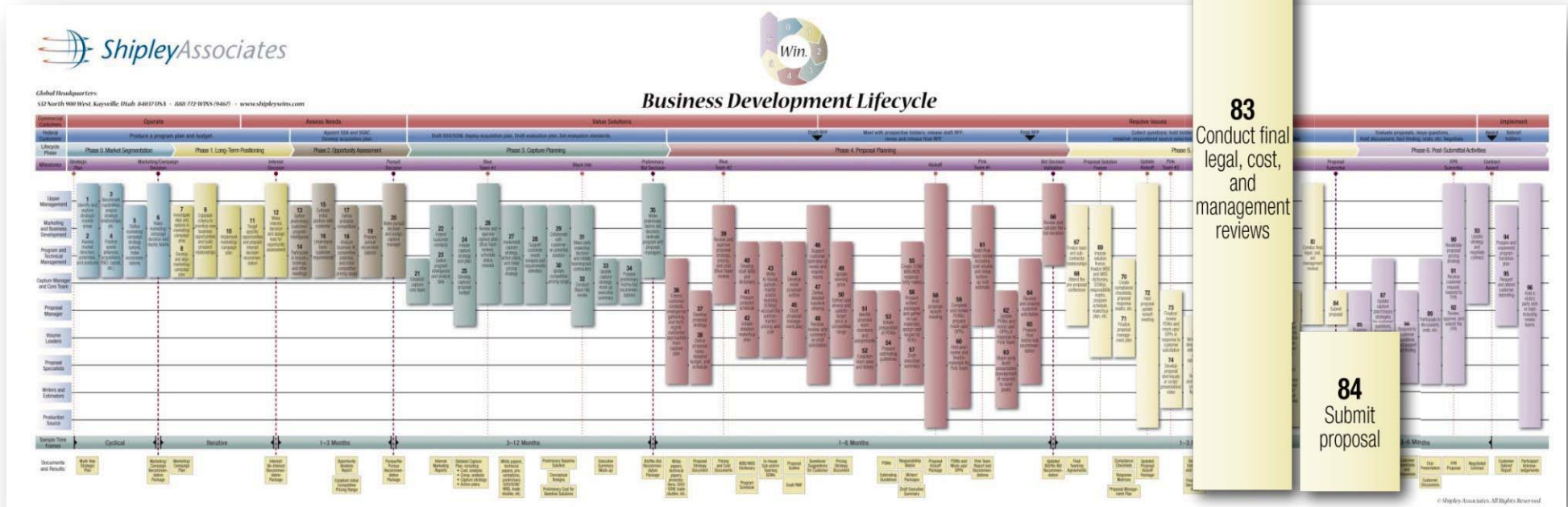
82 Conduct final compliance check and "publish" proposal deliverables





Confirm the Bid Decision

9.6 Confirm the decision to submit the bid and deliver it on time

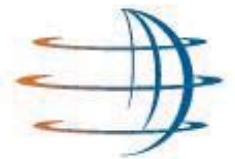


83
Conduct final legal, cost, and management reviews

84
Submit proposal



Summary





Let's Back Up to Good Process

- In our 9.6 steps did we?
 - Emphasize planning to minimize risk
 - Align with the buyer to improve customer focus
 - Collect analysis to support decision making
 - Rely on team reviews to drive collaboration
 - Institutionalize best practice
 - Maintain the “big picture” with rational approaches to tasks
 - Suppress a “features checklist” mentality in favor of benefits driven solution

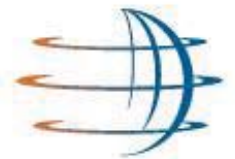




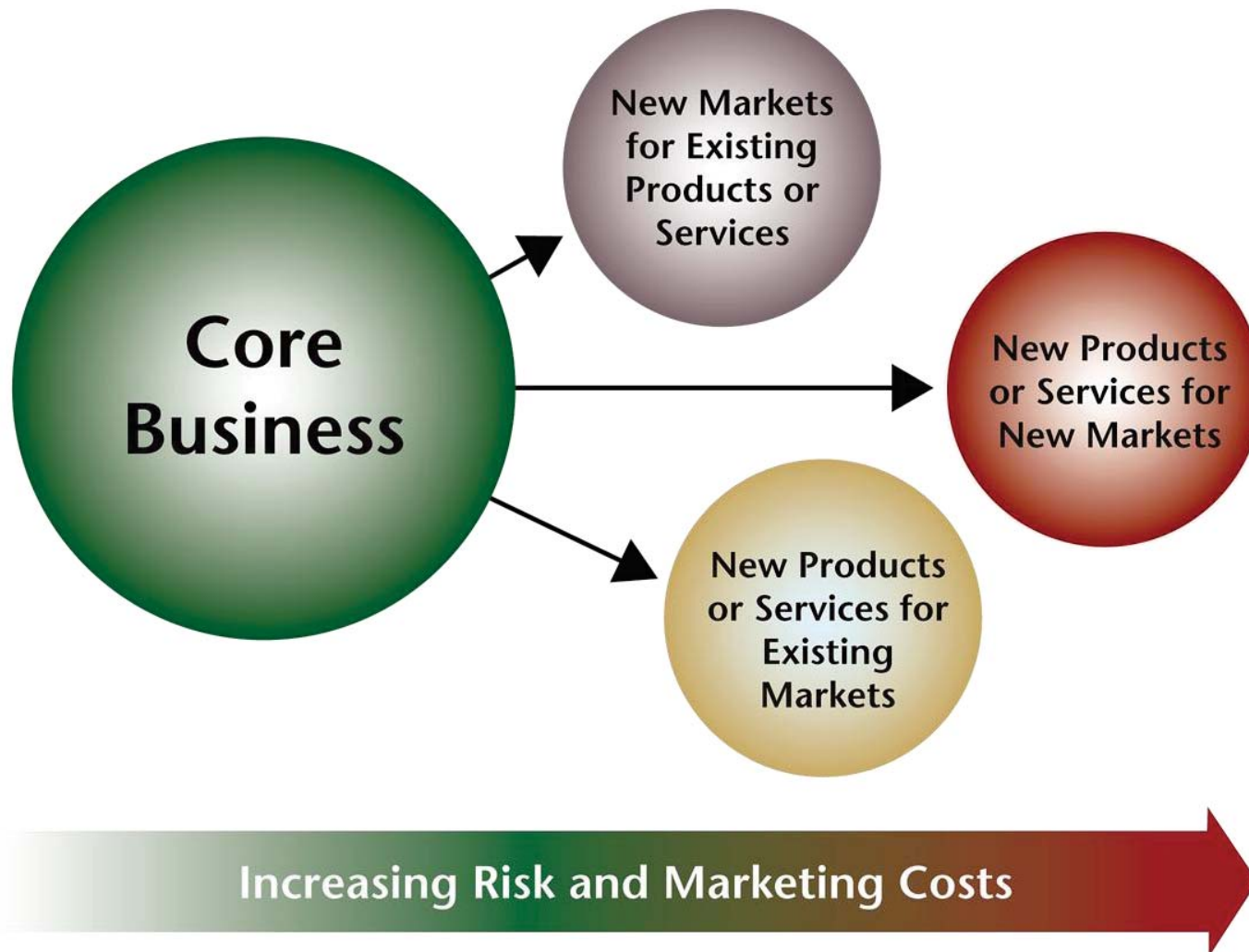
How About Our Tailoring?

- Did we delete things we didn't want to do?
 - Gate reviews
 - Storyboards
 - Color teams
- Can buyers still buy based upon our solution and price?

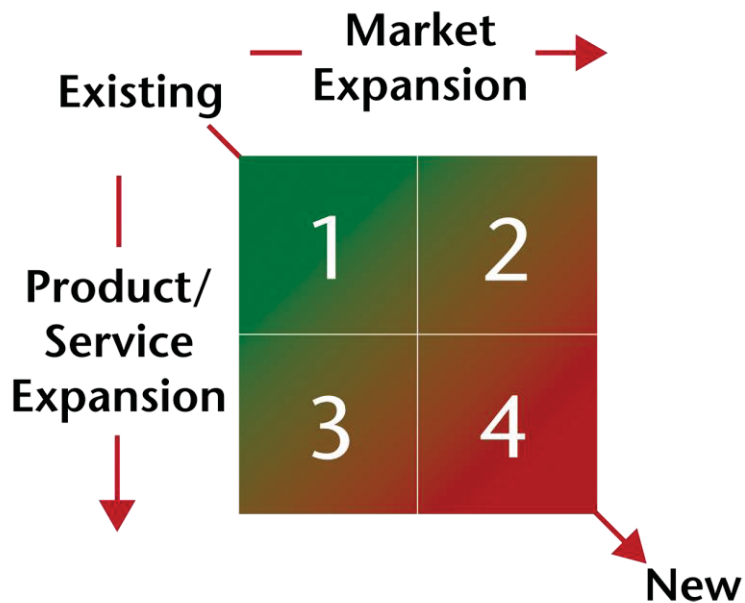
“Quick” Capture



Growth Paths Vary in Risk and Cost



Choose Opportunities You Can Win



Sector	Characteristics	Pursuit Indication	Early Action
1	Similar product or service, similar market	Strong	Focus on competitors
2	Similar product or service, new customers	Moderate	Learn market, establish presence
3	Similar customers, new product or service	Moderate	Verify needs of customers
4	New product or service, new customers	Weak	Create detailed plan, commit resources



Key Questions

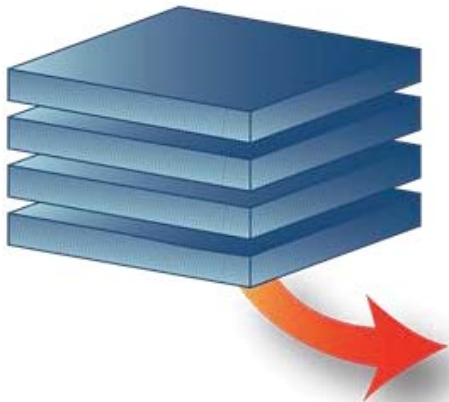
During Opportunity Assessment

- Is it real?
- What is it?
- Can we provide it?
- Will the customer buy from us?
- What is the budget?
- How will it be funded?
- What is the schedule?
- Where will it take us?

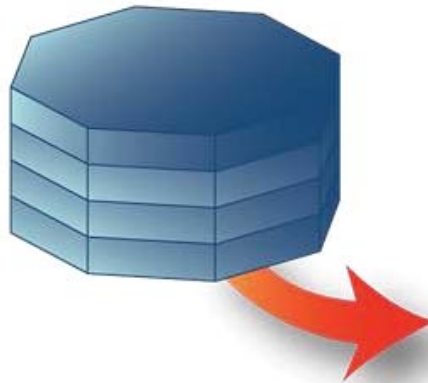


Collaborate on a Differentiated Solution

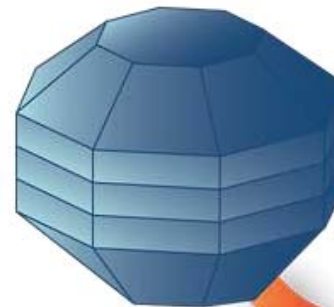
Concept 1:
Major Gaps with
Customer Issues



Concept 2:
Concurrence on
General Scope



Concept 3:
Agreement on
Basic Solution



Winning Concept:
Defined Solution with
Differentiated Value



What to Do When Time Is Short

1

Know who the customer is

2

Prepare bidder comparison chart

3

Team for strength

4

Focus strategy on customer value

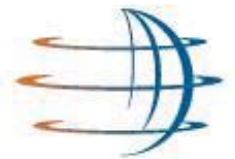
5

Communicate with proposal team



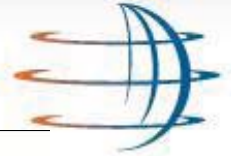
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**Rapid Response:
10/30/60**

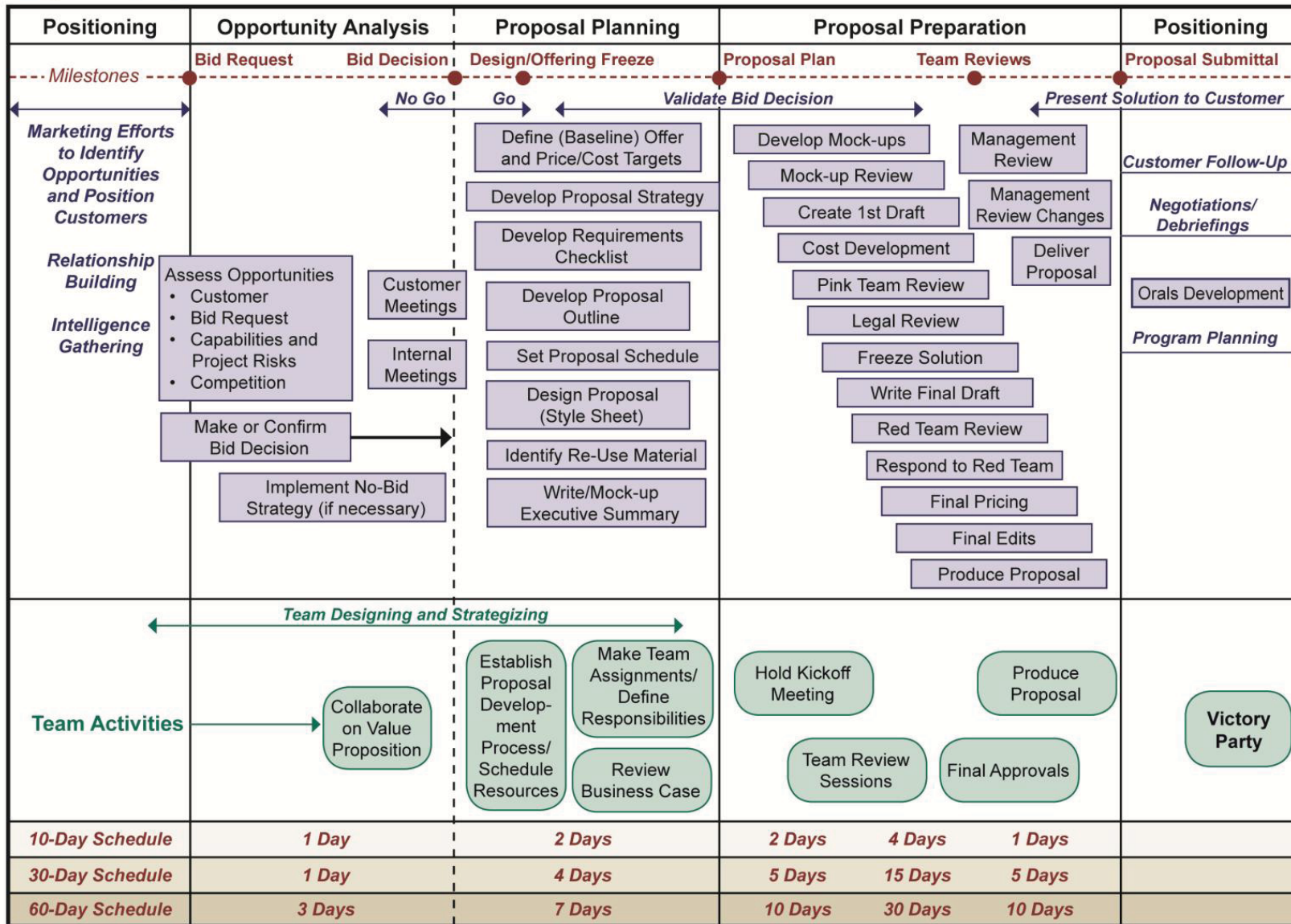


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Rapid Response Proposals



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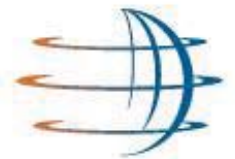
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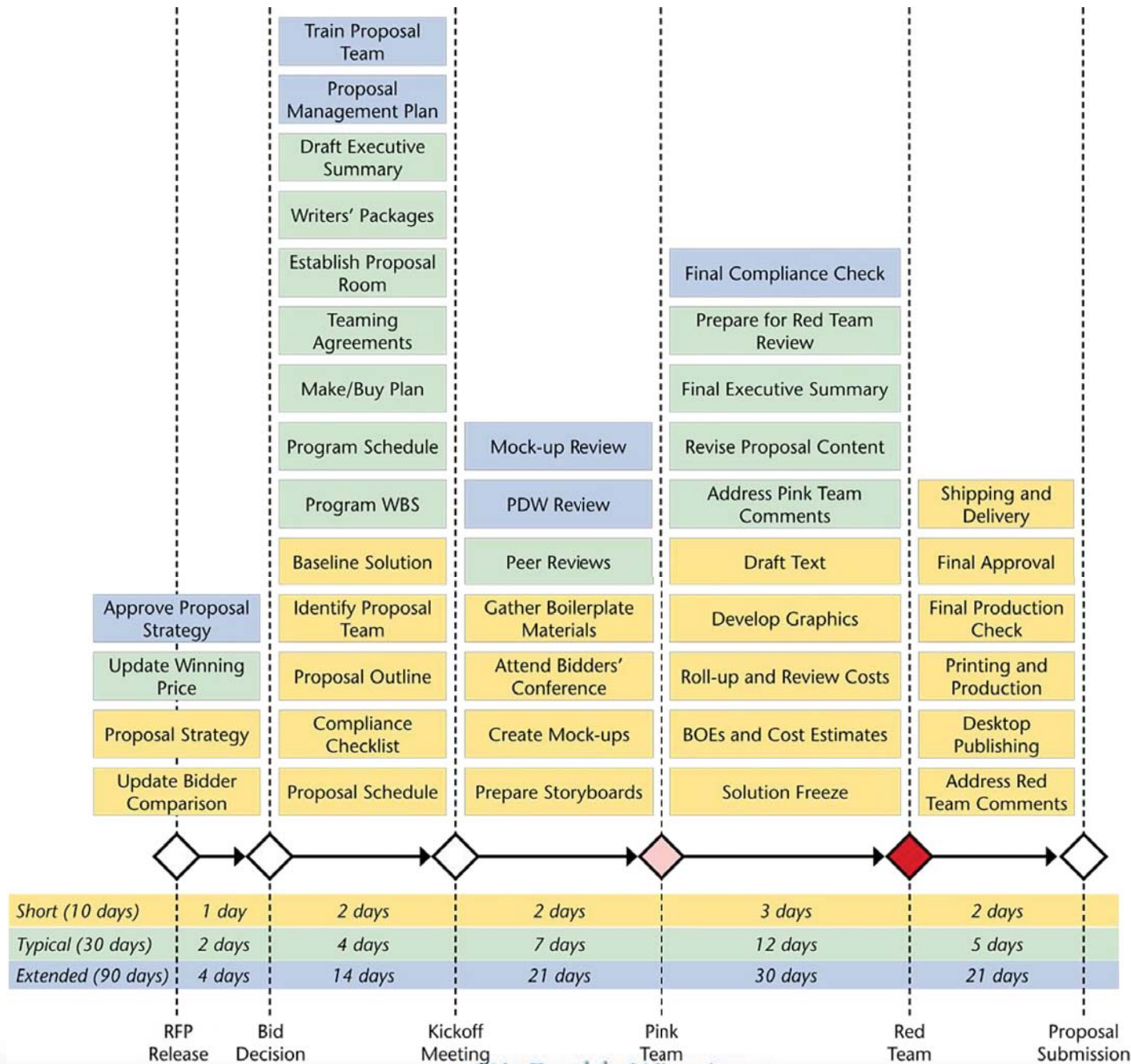
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**Rapid Response:
10/30/90**

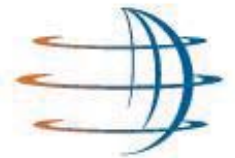


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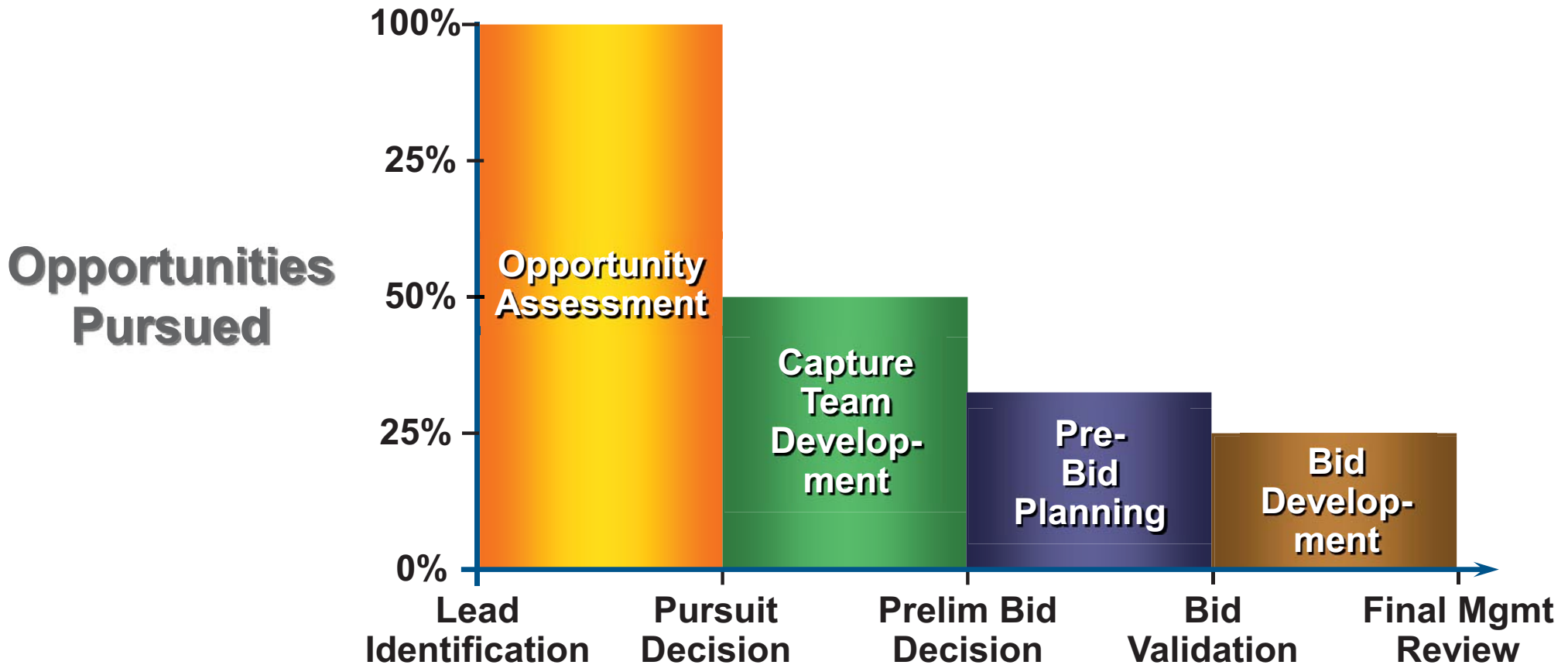


The Top 10--A Worst-Case Solution: Making the Best Out of a Bad Situation



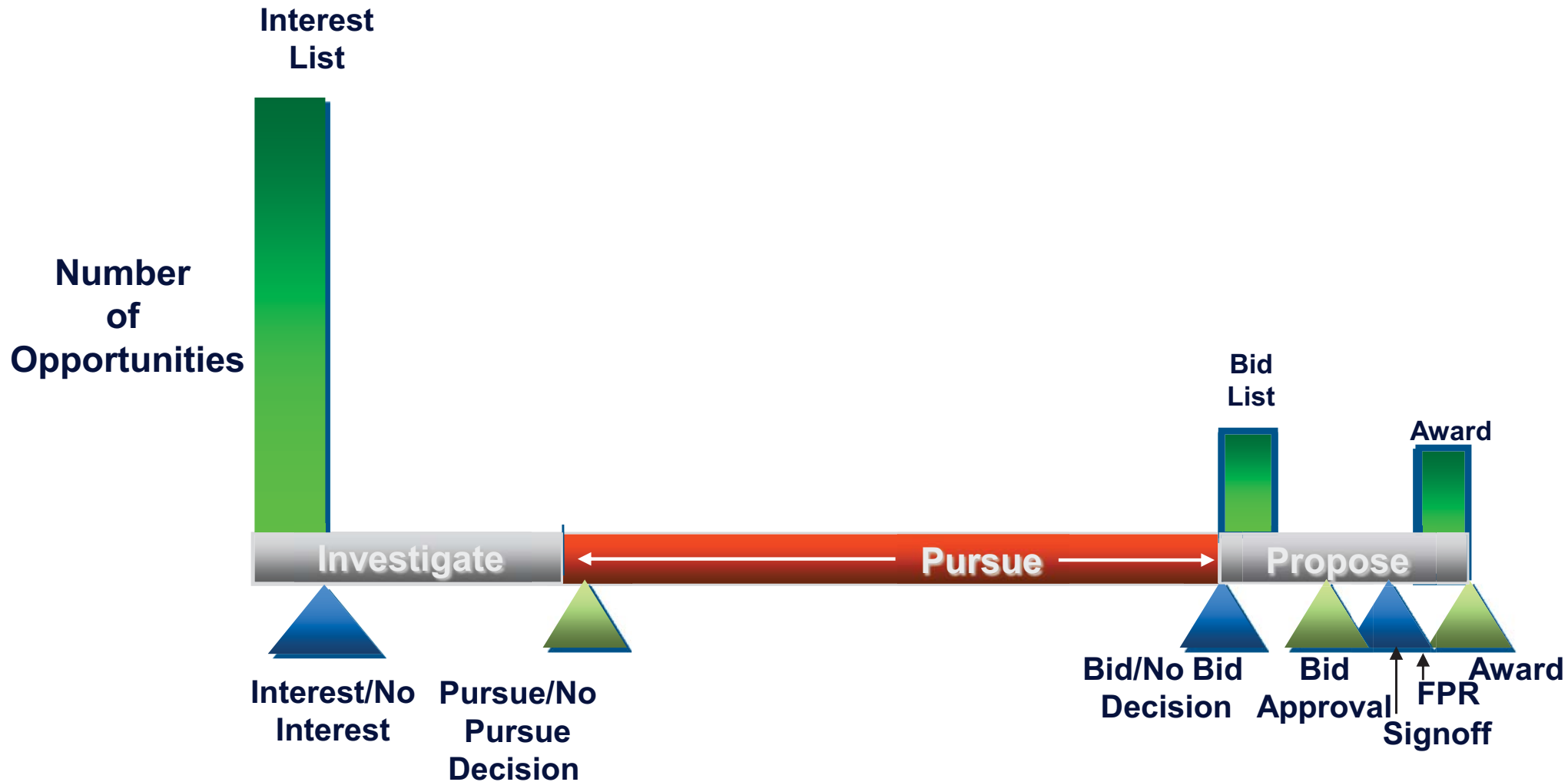


Decision Milestones Facilitate the Opportunity “Funnel”



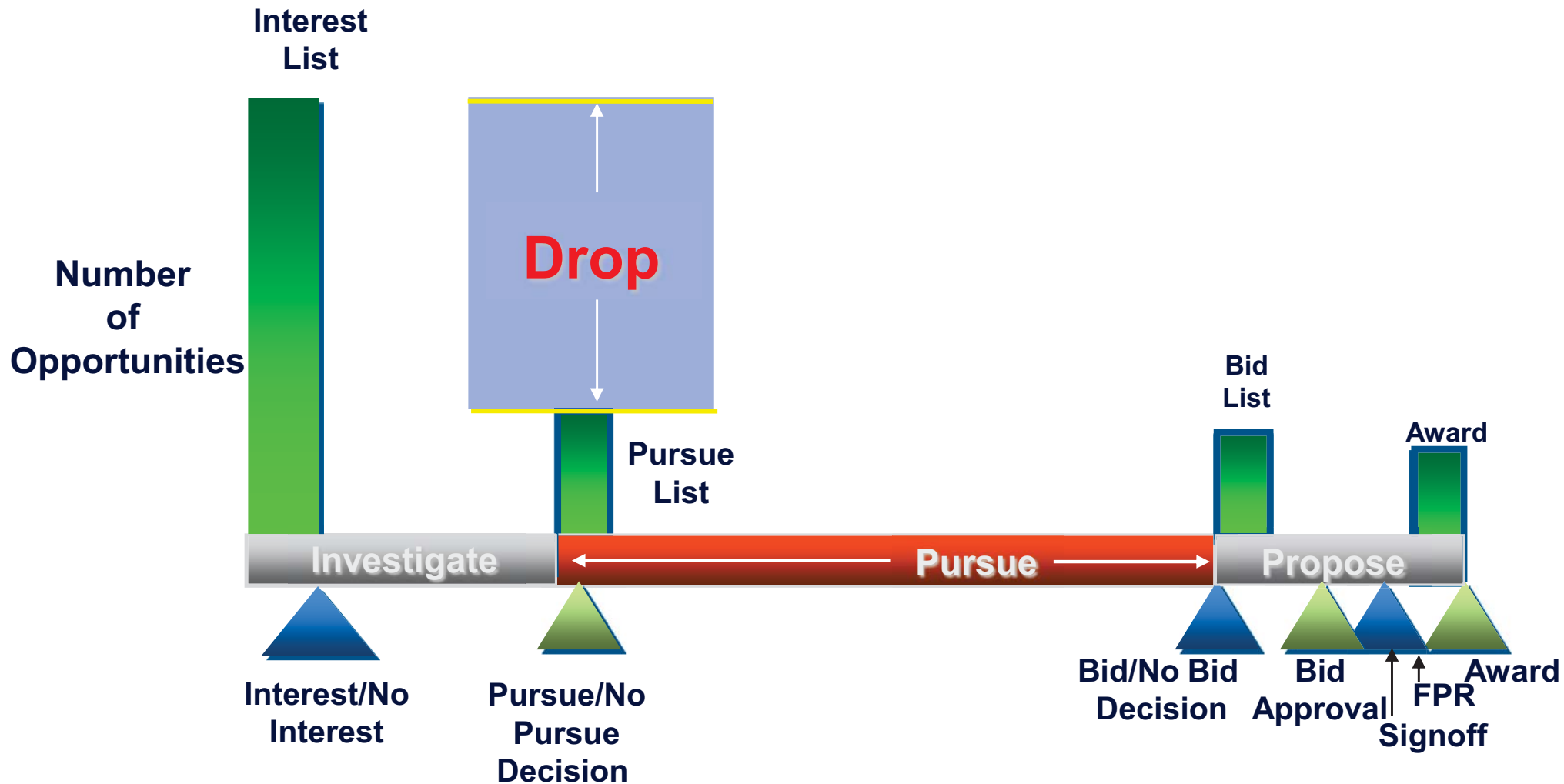


Opportunity Development and Selection





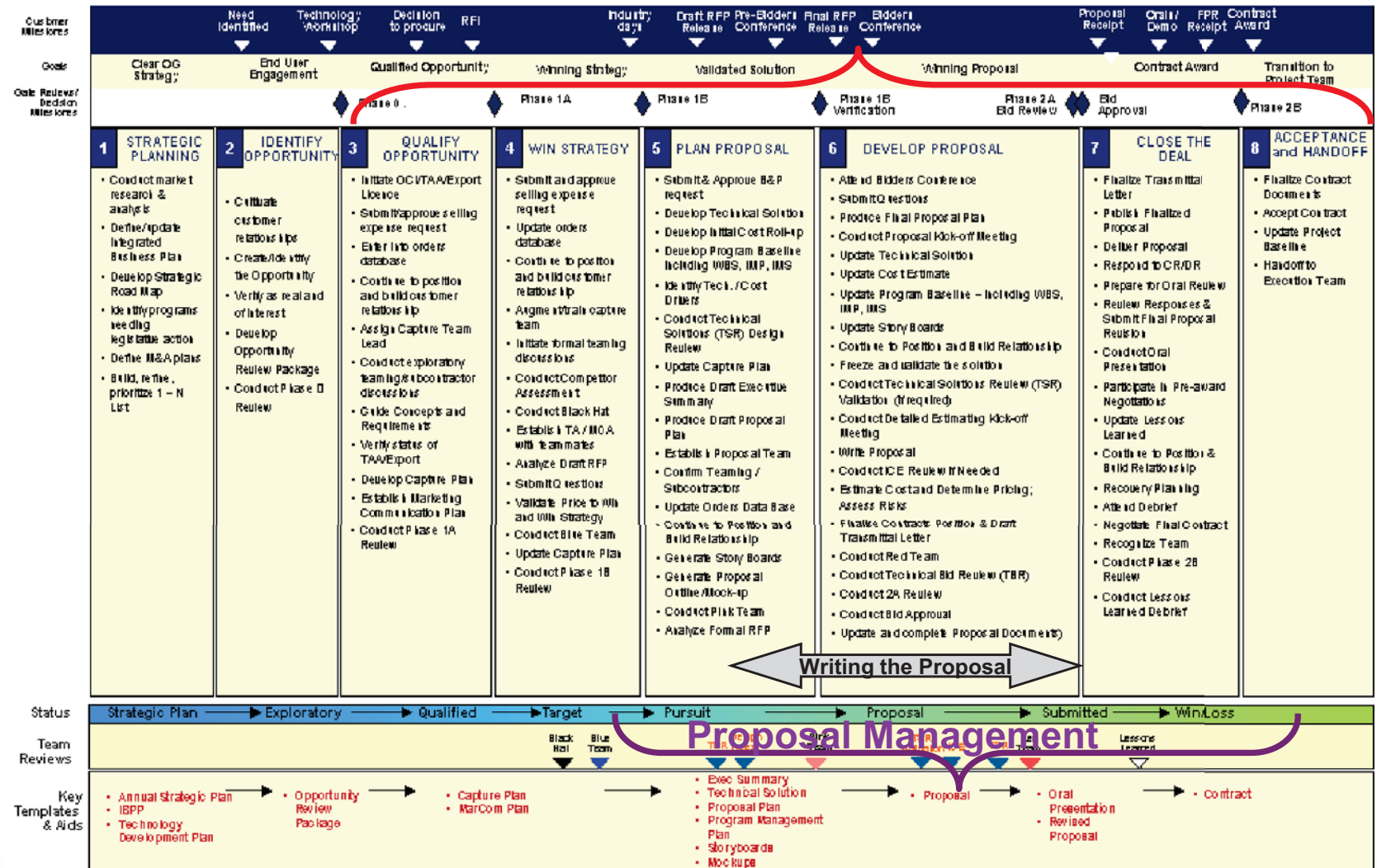
Opportunity Development and Selection





A Process (in an Ideal World)

Capture Management





The Big 10 Milestones

Client Interface

Kickoff Meeting

Compliance Checklist

Pink Team

Win Strategy

First Draft

Outline

Red Team

Schedule

Proposal Production

The level of detail will be determined by the type of opportunity and time available!





But if it is Like This, What to Do?





The Big 10 Milestones

~~Client Interface~~

Kickoff Meeting

Compliance Checklist

Pink Team

Win Strategy

First Draft

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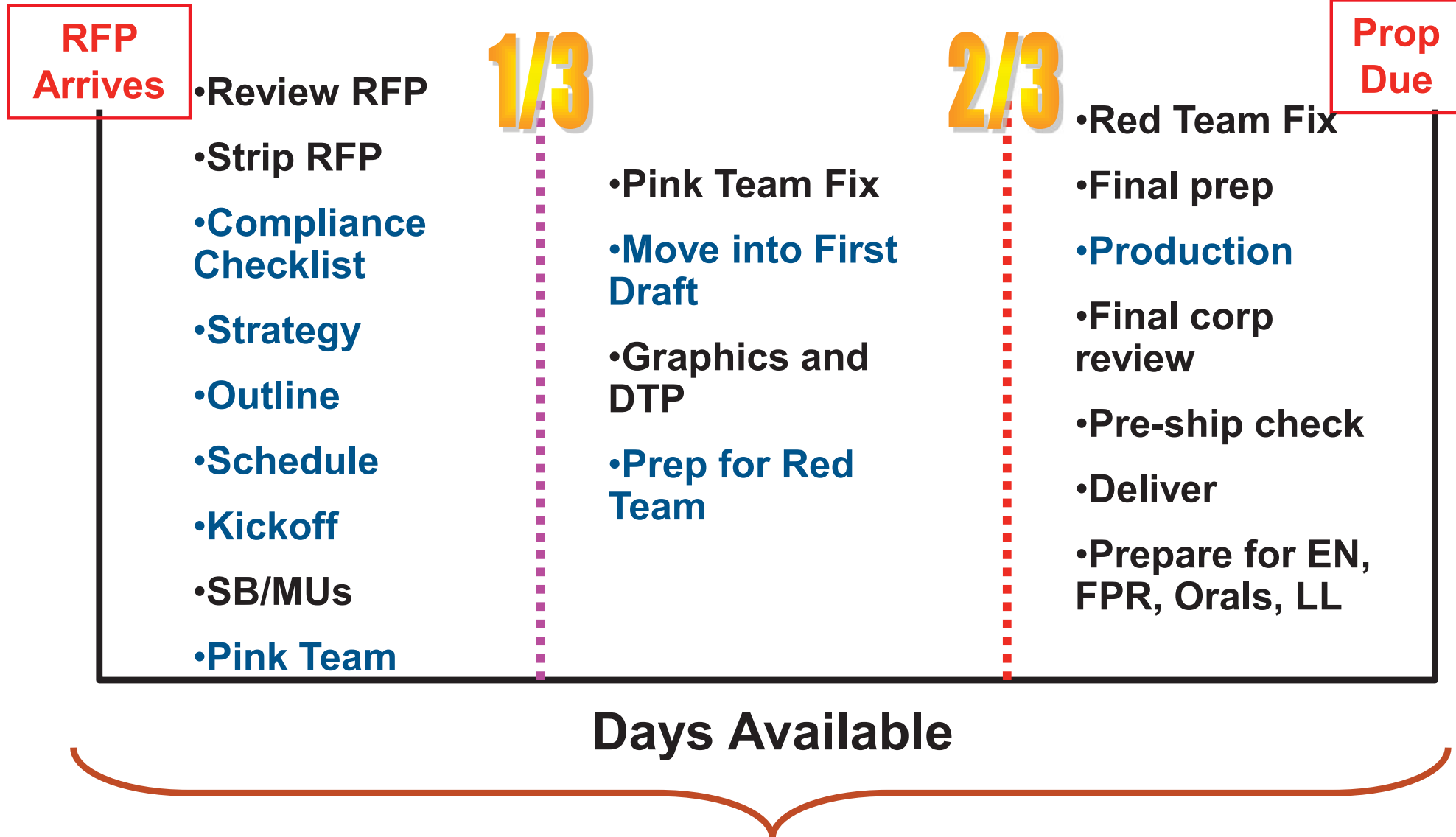
Proposal Production

The level of detail will be determined by the type of opportunity and time available!



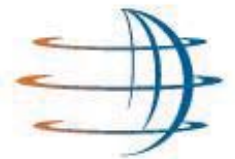


Best Use of “Crunch” Time



We've Covered---

- *96 to 9.6—a 10% solution*
- *Some medium slicing and dicing to meet deadlines*
- *Quick Capture*
- *10/30/60*
- *10/30/90*
- *Top 10: A worst-case scenario*

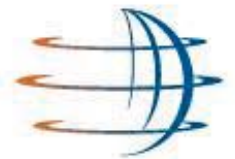


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Questions?????



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Tailoring the Business Development Process

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