

Professional Training Day

Raising the White Flag & Not Getting Shot: How to determine & report workload capacity

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Anyone Else Have Days Like This?





Wish You Could Surrender - And Not Take on More?

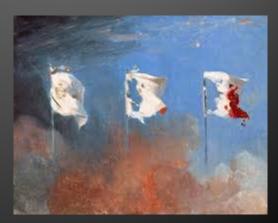




Why Wait Until You're Bleeding to Raise the White Flag?

Don't wait until you're desperate and you and/or your team is miserable

Communicate your Workload Capacity all the time, even when it's low





How Do I Communicate When I Don't Know It?

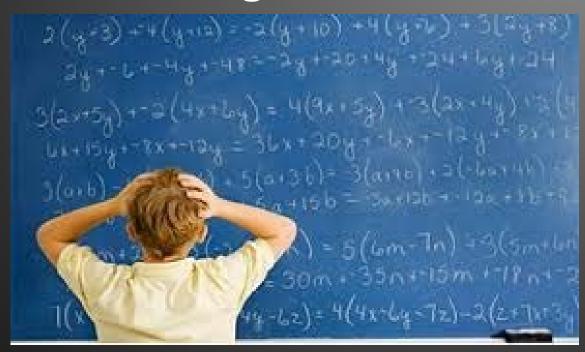
First you have to figure it out – but

Keep

It

Simple

Silly





Two Types of Tools Objective and Subjective





Objective Tool Development No More Than 5 Measures

Don't overcomplicate it. As you will see with the next five examples, these work for almost anything.



Objective Tool Development Example 1 - # of Pages:

- 1 point < 20
- 2 points 20-50
- 3 points 51-75
- 4 points 76-100
- 5 points > 100



Objective Tool Development

Example 2 – Size of Team/SMEs to Write:

- 1 point = 1 person
- 2 points = 2-5 people
- 3 points = 6-10 people
- 4 points = 10-20
- 5 points > 20



Objective Tool Development Example 3 – Type of Product/Solution

- 1 point = Quoted Similar Many Times
- 2 points = Combining Products/Solutions
- 3 points = Tweaks to Familiar
- 4 points = Major Modifications
- 5 points = Completely New/Different



Objective Tool Development Example 4 – Dollar Value

- 1 point = Low Value
- 2 points = Fair Value
- 3 points = Average Value
- 4 points = High Value
- 5 points = Highest Value





Objective Tool Development Example 5 – Turnaround Time

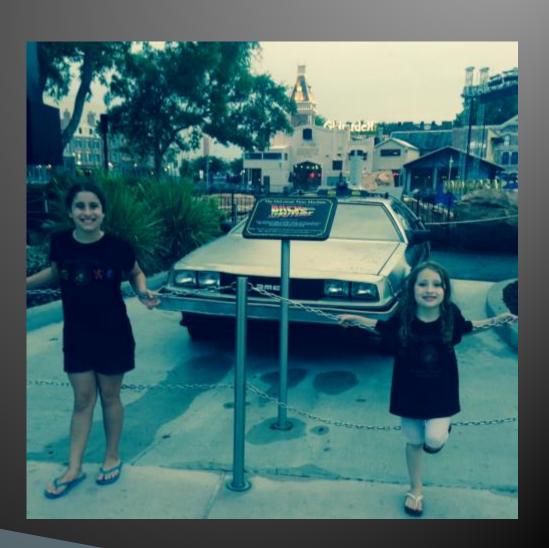
- 1 point = Forever or seems like it
- 2 points = Long Time
- 3 points = Average Time
- 4 points = Short Time
- 5 points = Where's My DeLorean?



Objective Tool Development

Actual Photo I Sent My Boss

CAPTION: I'm going to need to borrow this to get that new proposal done on time!





Boil Down Your Top 5

You Can Weight Differently, But Come Upwith a Range Combining All 5:

- 1. Easy = 5-7 points
- 2. Fair = 8-12 points
- 3. Moderate = 13-17 points
- 4. High 18-22 points
- 5. Extreme >22 points



Use Your Tools

Whatever System You Use to Track and Assign Work, Incorporate 5 Questions with Dropdown Responses

Assignor or Assignee Answers Each

Add Logic to System to Calculate with Desired Weightings And Enter 1-5 OR

Provide an Excel Sheet to Use and Just Capture Final Number – 1-5



Subjective Tool Development Scale of 1 (easy) to 5 (extreme)

Original method

Proposal manager assigns number (ability to change 1 level +_ during)

Advantage – newer proposal specialists rate work harder, seasoned easier

No math, results very similar



Which Tool?

Combine

Objective

Subjective

Any way you choose, please make sure you incorporate a final 1-5 rating in your work assignment system.



That's Great for Assigning What About Team Capacity?

Interview for Ideal, High, Maximum:

Highest performer

Newest team member

Average performer



Team Capacity Use Your Answers to Chart Team

Highest performer: Ideal is 9 points, High is 12 points, Maximum is 15 points

Newest team member: Ideal is 4 points, High is 6, Maximum is 9 points

Average performer: Ideal is 6 points, High is 9 points, Maximum is 12



Team Capacity Add Up Based on Team

If team is average (2 senior, 6 average, and 2 newer, just use average number

Tempting to multiply the averages by the number of people and DONE





Team Capacity Other Considerations

Other projects, time commitments

Sick, vacation, and leaves

How many actually manage proposals?

If high to maximum will management jump in?



Team Capacity Example

We have a team of 12

8.5 are Proposal Managers

-1.5 to account for projects and time off

7 X averages =

21 low, 42 ideal, 63 high, 84 max



Team Capacity Now You've Got It, Flaunt It

You need to share this weekly or monthly with Capture Management or Sales.

Maximum is not sustainable for any length of time. Goal is below 90% of time.

When you get into high, you start warnings.



Communicate Weekly

					_					
Proposal Name				Proposal Man.		Due Date	Status	Туре	Offerings	Current
Vandelay Industries	\$9,810,000		Susie Salesgirl	Sally Stress		05/13/2016			New	Jerks
CHOAM	\$20,000,000		Cliff Closer	Paul Pizza		05/16/2016				VSP
Acme Corp.	\$5,000,000		Nate Negotiate	Eddie Editor		05/20/2016	•	Off Renewal	Combo	VSP
Sirius Cybernetics Corp.	\$1,091,508		Bob Bidder	Tara Talker		05/23/2016	•	New Sales	Common	Meanies
Soylent Corp.	\$1,000,000		Dora Negotiator	Sam Sick	04/29/2016	05/20/2016	Open	Off Renewal	Common	VSP
Tyrell Corp.	\$1,800,000	3	Susie Salesgirl	Sally Stress	04/21/2016	05/18/2016	Open	Off Renewal	Common	VSP
Wayne Enterprises	\$2,659,767		Cliff Closer	Paul Pizza		05/06/2016		Off Renewal	Common	VSP
Virtucon	\$332,880	3	Nate Negotiate	Eddie Editor	04/28/2016	05/11/2016	In Review	New Sales	Common	Blah
Wonka Industries	\$1,603,045	3	Bob Bidder	Tara Talker	04/21/2016	05/11/2016	Finalizing	Renewal	Combo	VSP
Stark Industries	\$500,000	3	Dora Negotiator	Sam Sick	05/03/2016	05/13/2016	Open	Renewal	Common	VSP
Clampett Oil	\$70,000	2	Susie Salesgirl	Sally Stress	05/02/2016	05/13/2016	Open	Renewal	Common	VSP
Oceanic Airlines	\$165,512	3	Cliff Closer	Paul Pizza	04/19/2016	05/06/2016	In Review	New Sales	New	None
Cyberdyne Systems Corp.	\$50,000	2	Nate Negotiate	Eddie Editor	05/02/2016	05/13/2016	Open	Off Renewal	Common	VSP
Gringotts Bank	\$300,000	3	Bob Bidder	Tara Talker	05/02/2016	05/13/2016	Open	Renewal	Common	VSP
Oscorp	\$104,352	3	Dora Negotiator	Sam Sick	04/25/2016	05/13/2016	In Review	New Sales	Common	Evil
Nakatomi Trading Corp.	\$174,000	2	Susie Salesgirl	Sally Stress	04/21/2016	05/10/2016	Finalizing	New Sales	Common	VSP
Spacely Space Sprockets	\$99,000	3	Cliff Closer	Paul Pizza	04/20/2016	05/06/2016	Finalizing	New Sales	Common	Evil
Mystery Inc.	\$133,620	3	Nate Negotiate	Eddie Editor	04/28/2016	05/11/2016	In Review	New Sales	Common	Jerks
Dunder Mifflin	\$50,000	3	Bob Bidder	Tara Talker	04/22/2016	05/10/2016	Finalizing	New Sales	Combo	Meanies
Slate Construction Company	\$60,000	3	Dora Negotiator	Sam Sick	04/21/2016	05/10/2016	In Review	New Sales	Common	Jerks
Hennigan's	\$74,800	4	Bob Bidder	Sally Stress	04/29/2016	05/16/2016	Open	Pullout	Common	VSP
LexCorp	\$1,500	3	Dora Negotiator	Paul Pizza	04/26/2016	05/27/2016	Open	New Sales	Common	Meanies
	\$45,079,984	65								
		Workload Capacity: 84=max 63=high 42=med	Complexity Legend: 5=extreme 4=difficult 3=moderate 2=fair 1=easy							



Make Them the Bad Guys Make Them Decide When to Not Bid

In the example we were at high on our way to maximum capacity

Nearing max capacity, we highlight any unstarted RFPs and let Sales Management decide which not to pursue

We make recommendations, but they have the authority and accountability



How Do You Qualify Proposals?



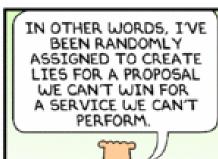
















Capacity Helps Bad Qualification

Executive commitment to collaborate on prioritization when at/near max capacity.

Catalyzed need for bid qualification at the executive levels and has "trickled down."

"De-personalizes" and "de-mystifies" workload capacity (objective, fact-based formula that is quantifiable, repeatable, reliable, and scalable).



No Burnout = Happy Employees

Improved proposal team morale:

Reasonable workload is the expectation.

Reduces time spent "chasing garbage"

trucks"





Questions?



Thank You

