



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 Up with 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	Revenue	Complexity	Sales Team	Proposal Man.	Rec. Date	Due Date	Status	Type	Offerings	Current
Vandelay Industries	\$9,810,000	3	Susie Salesgirl	Sally Stress	04/13/2016	05/13/2016	In Review	New Sales	New	Jerks
CHOAM	\$20,000,000	3	Cliff Closer	Paul Pizza	04/17/2016	05/16/2016	In Review	Renewal	Common	VSP
Acme Corp.	\$5,000,000	4	Nate Negotiate	Eddie Editor	05/02/2016	05/20/2016	Open	Off Renewal	Combo	VSP
Sirius Cybernetics Corp.	\$1,091,508	3	Bob Bidder	Tara Talker	05/04/2016	05/23/2016	Open	New Sales	Common	Meanies
Soylent Corp.	\$1,000,000	3	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	3	Cliff Closer	Paul Pizza	04/26/2016	05/06/2016	Open	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 21=low	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