Writing for Evaluators

Successful proposal writers know how evaluators read and score proposal sections and how both customer processes and human psychology define the characteristics of winning proposals.

Definition of Boredom (American Heritage Dictionary 2019)

bore·dom (bôr-dəm)

n.
The condition of being bored; ennui.

bore ² (bôr)

tr.v. **bored**, **bor·ing**, **bores**
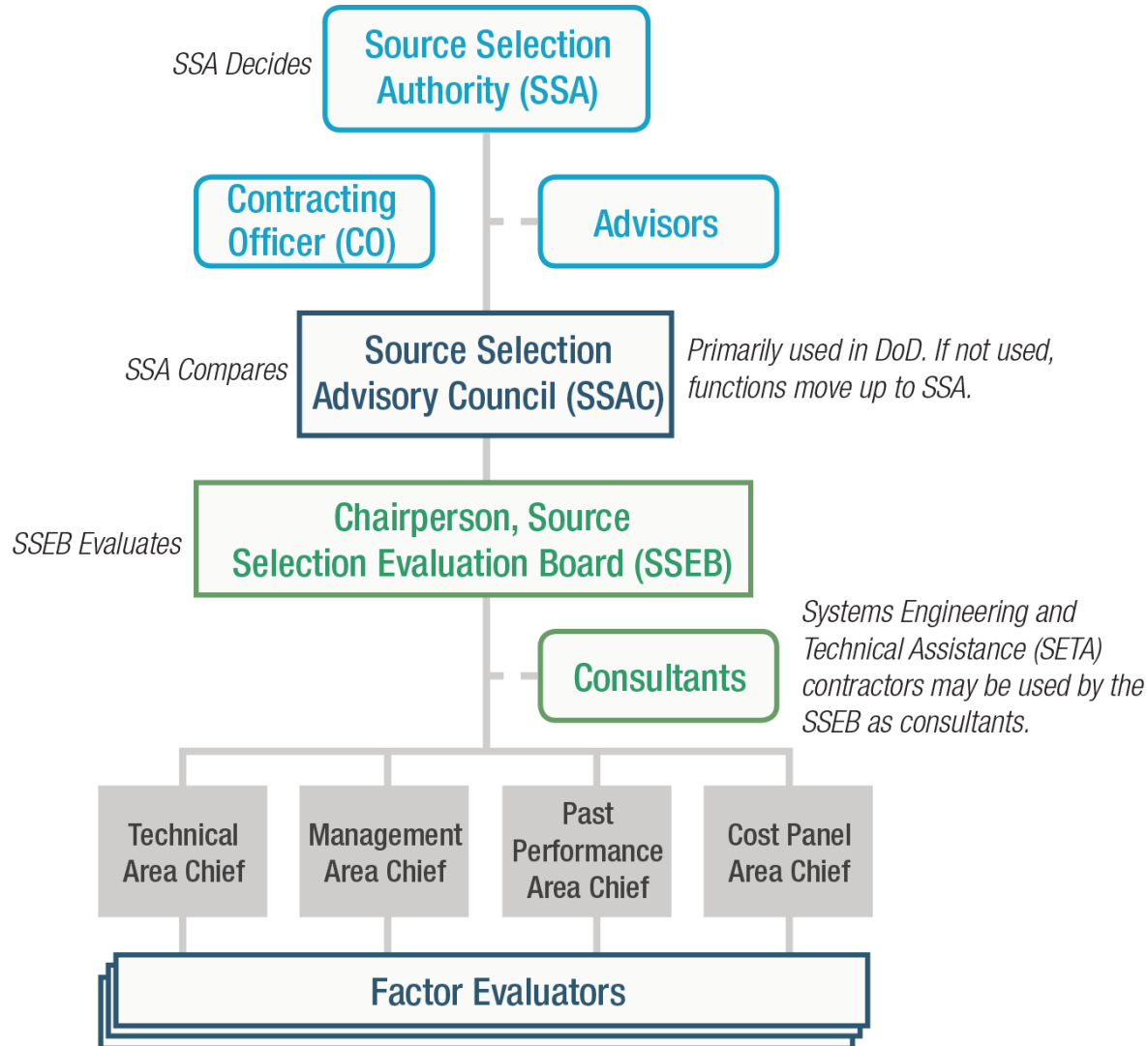To make weary by being dull, repetitive, or tedious: The proposal response bored us.

We must avoid these at all costs in our responses!

Usage Note: If an activity or experience starts to bore you, are you bored *by* it, bored *of* it, or bored *with* it? All three constructions are common in informal writing and speech
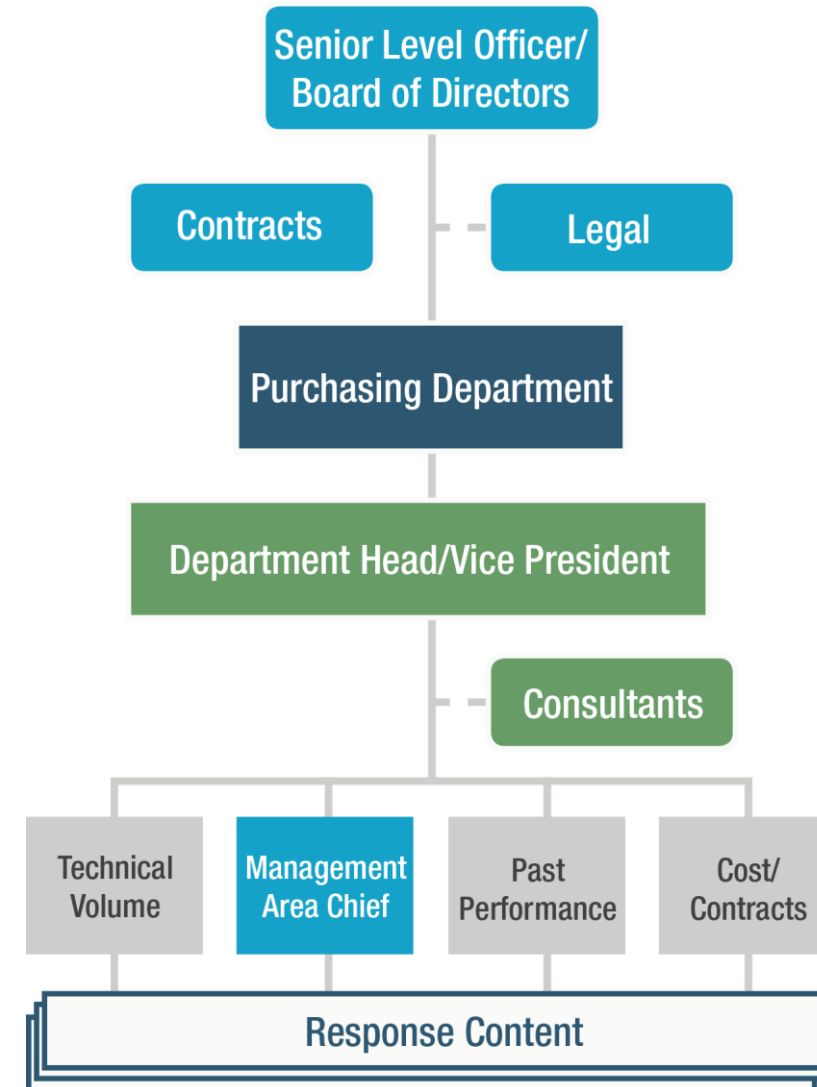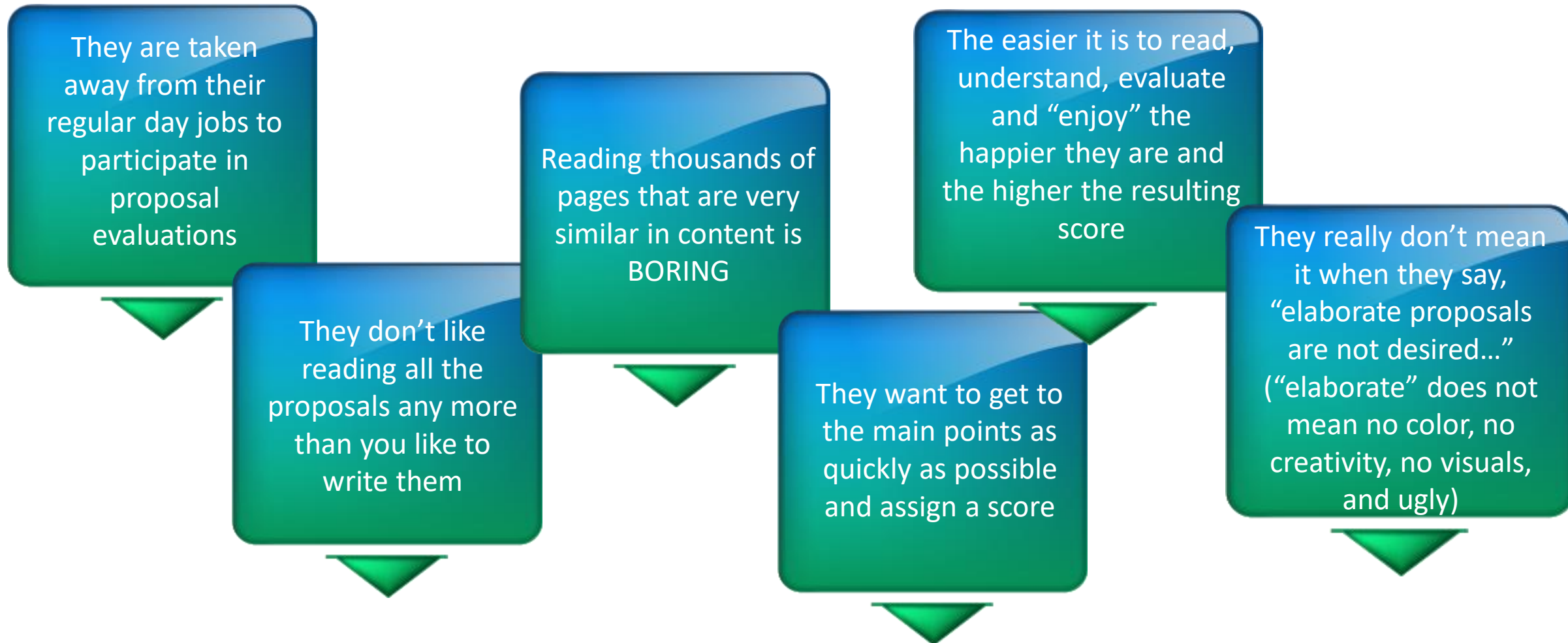
Who Are Our Evaluators?

Federal

SSA Decides — Source Selection Authority (SSA)

Contracting Officer (CO) — Advisors

SSA Compares — Source Selection Advisory Council (SSAC)
Primarily used in DoD. If not used, functions move up to SSA.

SSEB Evaluates — Chairperson, Source Selection Evaluation Board (SSEB)

Consultants
Systems Engineering and Technical Assistance (SETA) contractors may be used by the SSEB as consultants.

Technical Area Chief | Management Area Chief | Past Performance Area Chief | Cost Panel Area Chief

Factor Evaluators

Commercial

Senior Level Officer/ Board of Directors

Contracts — Legal

Purchasing Department

Department Head/Vice President

Consultants

Technical Volume | Management Area Chief | Past Performance | Cost/ Contracts

Response Content

Customer Evaluator Considerations
Evaluators are Just Like Us in Many Ways

They are taken away from their regular day jobs to participate in proposal evaluations

They don't like reading all the proposals any more than you like to write them

Reading thousands of pages that are very similar in content is BORING

They want to get to the main points as quickly as possible and assign a score

The easier it is to read, understand, evaluate and "enjoy" the happier they are and the higher the resulting score

They really don't mean it when they say, "elaborate proposals are not desired…" ("elaborate" does not mean no color, no creativity, no visuals, and ugly)

Customer Evaluator Considerations

If You Want to Win, Make the Evaluator's Job Easy

- You have to overcome the fact that 40 – 60% of the time the customer already knows who they want to win before the bids are submitted

- Applying proposal best practices will help overcome this mindset

Proposal Rules Boost Win Probability

- Write to evaluators
- Use headings that mirror RFP
- Follow customer's language
- Emphasize functions, not operational details
- Substantiate claims
- Use tradeoffs to ghost competition
- Address risk management
- Understand and address the evaluators customer

Evaluator Motivational Indicators

Vision statement

Benefits listed before features

Link between vision and *this* buy

Directions were followed

Supports their end user

Hot button ownership explicit

Hot buttons prioritized

Organization announced and followed

Buyer named before seller

Buyer named more often than seller

Low Risk to their organization

Customer-relevant proofs

Summary and next steps

RFPs Describe Relative Importance of Factors

M.4 Relative Importance of Factors and Subfactors

The evaluation areas of technical, management, and price are of equal importance. Thus, all evaluation factors other than price, when combined, are significantly more important than price.

In the technical area, factors M.3.1.1, M.3.1.3, and M.3.1.4 are equal in importance. Factor M.3.1.2 is twice as important as factor M.3.1.1. Factor M.3.1.5 is one half as important as factor M.3.1.2.

In the management area, factor M.3.2.1 is twice as important as technical factor M.3.1.1. Management factor M.3.2.2 is twice as important as M.3.2.1.

NASA Selection Process
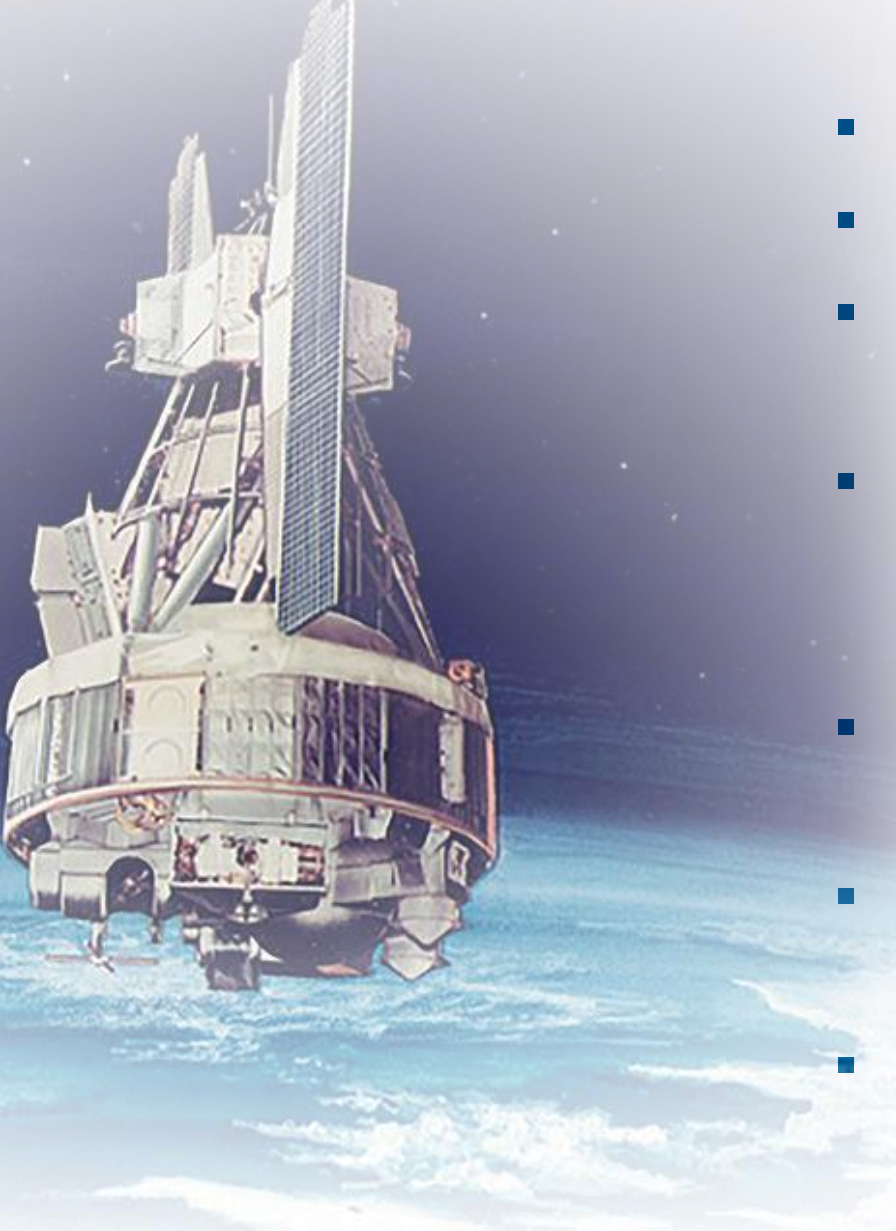
- Reviewed by a panel of professional peers

- Generally three readers of each proposal

- Reviewers are instructed to judge each proposal against the stated evaluation criteria and not to compare proposals

- Final proposal evaluation is reviewed and approved for completeness and clarity by the NASA Program Officer and, if appropriate, the chair of the panel.

- Program Officer develops a recommendation on which proposals to fund

- Selections are then made by the NASA Selection Official as identified in the Funding Announcement

- The highest evaluation factor – The proposal must compelling!

Many Scoring Systems Can Be Used

Numerical	Adjectival	Color	Ordinal
10 9 8	*Outstanding*	🟦	*1st*
7 6 5	*Good*	🟩	*2nd*
4 3	*Marginal*	🟧	*3rd*
2 1 0	*Unsatisfactory*	🟥	*4th*

Source: FAR 15.305(a)

How to Excite an Evaluator

- Compliance

- Responsiveness

- Strategic focus

- Competitive focus

- Quality of writing

- Visualization

- Page and document design

Compliance

Compliance means strict adherence to the prospect's bid request, both the submittal instructions and the requirements.

Being fully compliant will not ensure a win, but failure to be compliant can easily result in a loss.

Evaluators are looking for ways to eliminate you. Being non compliant is the fastest, easiest way to have you eliminated from the competitive group.

Is Compliance Necessary?

- *It is the Offeror's responsibility to submit a well-written proposal, with adequately detailed information which clearly demonstrates an understanding of and the ability to comply with all the solicitation requirements to allow for a meaningful review.* U.S. ARMY CONTRACTING COMMAND

- **Objective.** *The overall objective of this Task Order is to accomplish all technical and all program management planning, coordination, design, testing, evaluations including cost benefit analysis, qualification and analysis, validation and verification, demonstration plans, process orders, to transition solutions; product and/or process focused, using the new or substitute materials, processes, and product form(s) using the Air Force airworthiness approach.*

Compliance Checklist and Matrix

- Use compliance checklists to verify that every request has been answered and every requirement met. Evaluators refer to these often

- A good compliance checklist is the lynchpin of a compliant, responsive proposal.
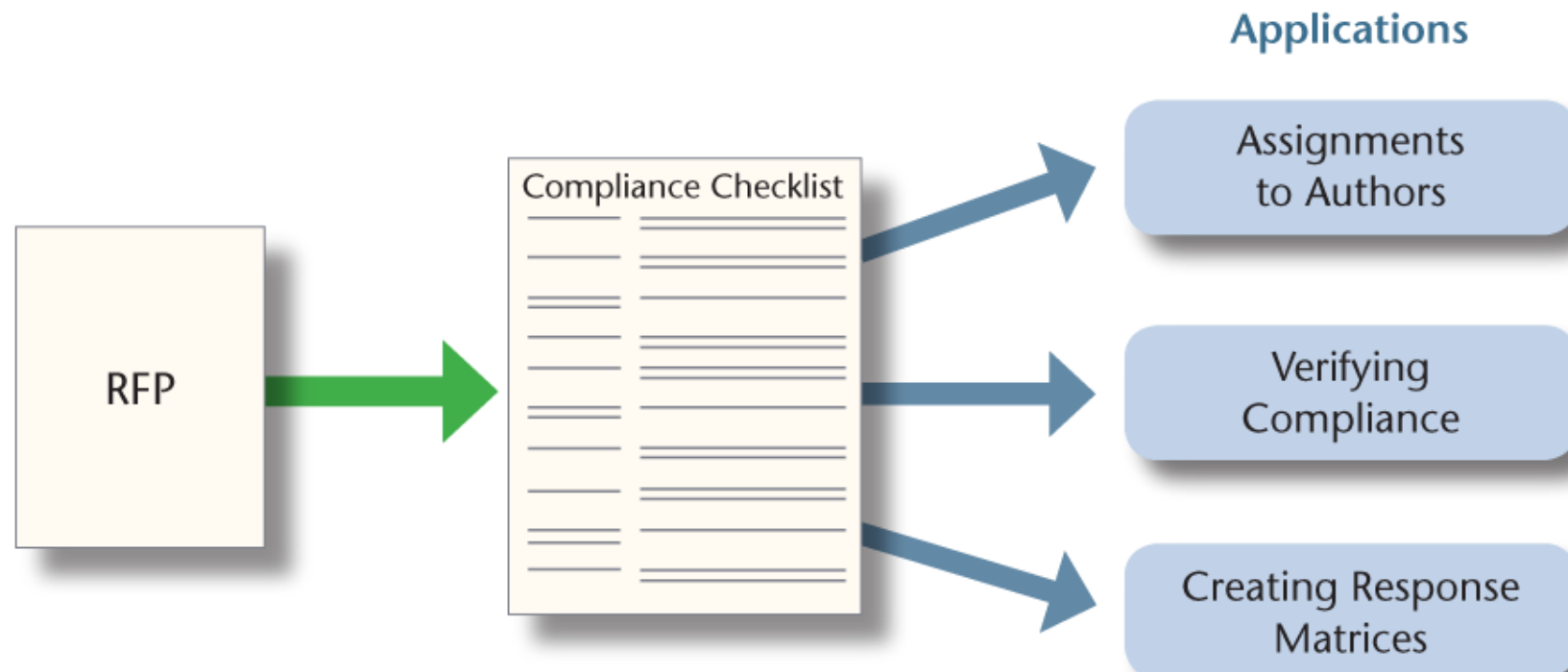
Responsiveness

Responsiveness means addressing the evaluator's underlying needs.

These features are most powerfully presented as discriminators, features of your offer that provide valued benefits to the evaluator's end user and are only available from you.

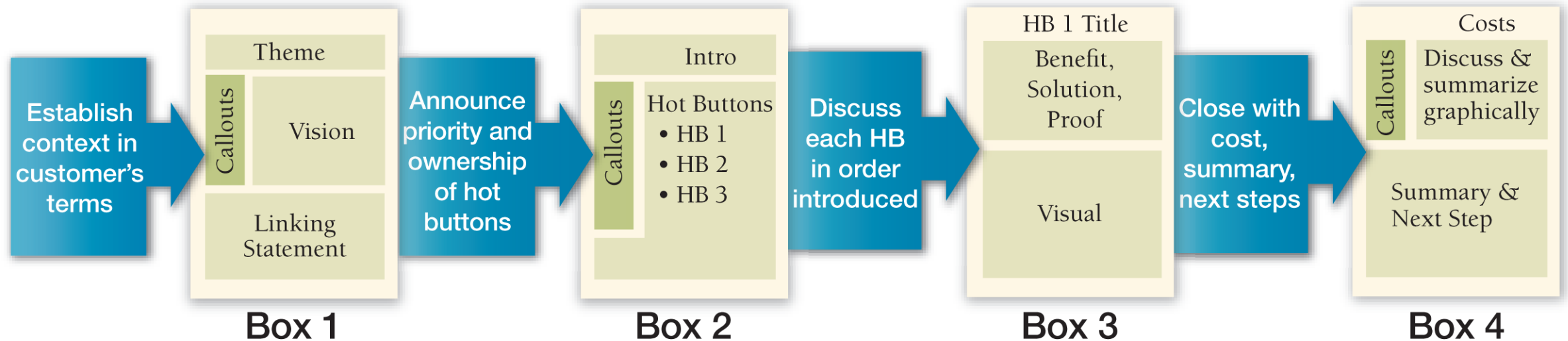# Understanding Customer Issues, Motivators, and Hot Buttons
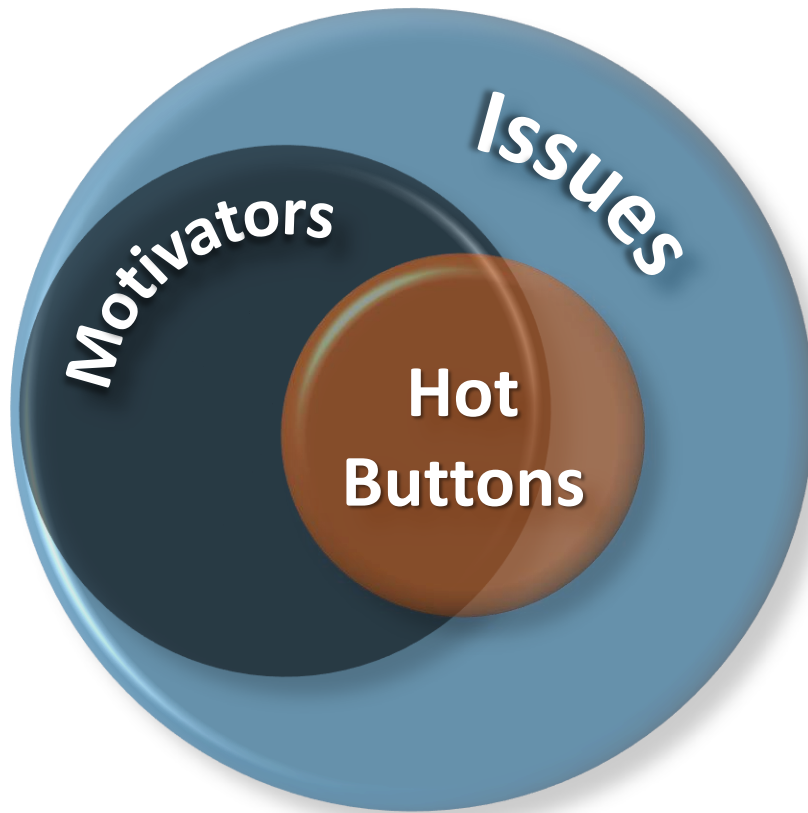
- **ISSUES:** *Customer concerns, the worry items that keep them awake at night.*

- **MOTIVATORS:** *The objectives that the customer is trying to achieve.*

- **HOT BUTTONS:** *The consolidated set of issues and motivators that will drive the buying decision.*

Any Issue Can Be a Hot Button

Structure of a Hot Button Executive Summary

Establish context in customer's terms →

Box 1
| Theme |
| Callouts / Vision |
| Linking Statement |

Announce priority and ownership of hot buttons →

Box 2
| Intro |
| Callouts / Hot Buttons: • HB 1 • HB 2 • HB 3 |

Discuss each HB in order introduced →

Box 3
| HB 1 Title |
| Benefit, Solution, Proof |
| Visual |

Close with cost, summary, next steps →

Box 4
| Costs |
| Callouts / Discuss & summarize graphically |
| Summary & Next Step |

Executive Summaries Serve External Purposes

Selling Your Solution

- Connects solution to Evaluator's vision
- Identifies Evaluator's needs
- Connects solution to evaluator's needs
- Offers clear proofs
- Shows you offer greater value than competition
- Indicates next step

Making Document Easier to Understand

- Previews content for familiarity
- Emphasizes key points at outset
- Guides evaluators to material of interest
- Furnishes context for wide audience

Promoting Collaboration

- Establishes framework for sales presentations
- Functions as white paper

…and Internal Purposes, Too

Formulating and Communicating Strategy

- Outlines solution alternatives
- Exploits competitor intelligence
- Documents win strategy
- Educates management
- Briefs business partners

Transferring Information

- Passes intelligence
- Disseminates win strategy and solution
- Links offer to customer's vision
- Standardizes pre- and post-RFP messages

Driving Proposal Development

- Models final proposal
- Defines strategic content
- Establishes style

Discriminators

Discriminators separate our proposal from other competitors. They take a proposal message from "why pick us" to "why pick only us".

Strategic Focus

Strategy is best developed during the pre-RFP capture phase. Strategies that move us to a favored position can be categorized as actions taken to leverage strengths, mitigate weaknesses, highlight competitor weaknesses, and neutralize competitor strengths.

These messages are presented in the proposal in a variety of ways including theme statements, action captions, informative headings, value propositions, risk mitigation approaches, and substantiated descriptions of benefits and discriminators.

Emphasize Messages for Evaluators

Section Heading

Subheading

Theme Statement

Caption Text

Volume I: Technical

6.3 Transition Approach

Outdoor Sports Global (OSG) will receive significant assistance through on-site Vibrant Account Executive support to insure a seamless transition and save OSG nearly $3 million in annual sales revenue that could be lost in any interruption entering new orders.

6.3.1. Transition Methodology that Insures Seamless Integration

OSG will receive special attention through our **on-site Account Executives** (AEs). It is through this key component of our methodology that we have a history of seamless integration into client companies. Having Vibrant Executives on-site for timely and tailored support will insure seamless integration and a smooth transition (see Figure 1).

OSG will also be assigned a small core group dedicated to your success. These levels of support will catch and quickly mitigate any problems at inception. This presence also allows for identifcation of early wins by integrating transition with selected transformation activities.

This methodology has been proven successful even in times of change. Vibrant helped Western Mountain Sports (WMS) increase their sales locations to 950 and achieve an 18 percent market growth. The transition was completed within budget on original schedule, even when WMS added 15 additional locations from an acquisition one month after the start of the project.

[Placeholder for a **visual**]

Figure 1. Transition Management Targeted to OSG. *Personal attention from on-site Account Executives and executive involvement in transition effort will insure seamless integration.*

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Strengthen Messages with Relevant Experience and Past Performance

- Include examples

- Emphasize graphically

- Use success stories

- Address weaknesses

- Stress lessons learned

Early Completion Earns $200,000 Award Bonus. *After careful evaluation of six design-build contractors, Global Manufacturing awarded a critical plant expansion contract to Shipley Constructors. We completed the project 23 days ahead of schedule, on budget, and earned a $200,000 bonus.*

Solutions Begin with Customer Issues

- Design specifications
- Maintenance
- Data and documentation
- Delivery rate
- Critical Path

Program Requirement

Needs
- User requirements
- Operational necessities
- Mission fulfillment

- Cost overruns
- Schedule slippage
- Technical failure
- Quality

Risks

Issues

Wants
- "Nice to haves"
- Future growth
- Redundancy
- Agency prestige

- Internal politics
- Outside pressure
- Supplier continuity
- Incumbent replacement

Hidden Agendas

Cost Concerns
- Total cost
- Budget profile

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Distinguishing Features from Benefits

For every feature ask:

So what?

Our customers buy benefits, not features

For every benefit ask:

How so?

Quantify Benefits in Your Writing

1 Because only customers can determine value, the customer and seller must collaborate to determine the value of a solution. After the customer has helped determine the value, the solution seems more acceptable to an evaluator.

2 Quantifying benefits improves the solution. The least beneficial features are dropped and more beneficial features might be added. Both the evaluator and the seller gain a clearer vision of the solution.

3 Evaluators often make a value judgment that the solution is worth the price. Group purchase decisions are easier when the benefits clearly exceed the price.

Competitive Focus

A winning proposal must not only respond to the prospect's issues and requirements, it must also reflect your knowledge of the competition and their strengths, weaknesses, solutions, and pricing.

A well-executed competitive assessment will contribute valuable input to your strategy, win themes, discriminators, solution, pricing and teaming considerations.

Competitive Focus

*Is it obvious why this offer is **better than competitor** offers?*
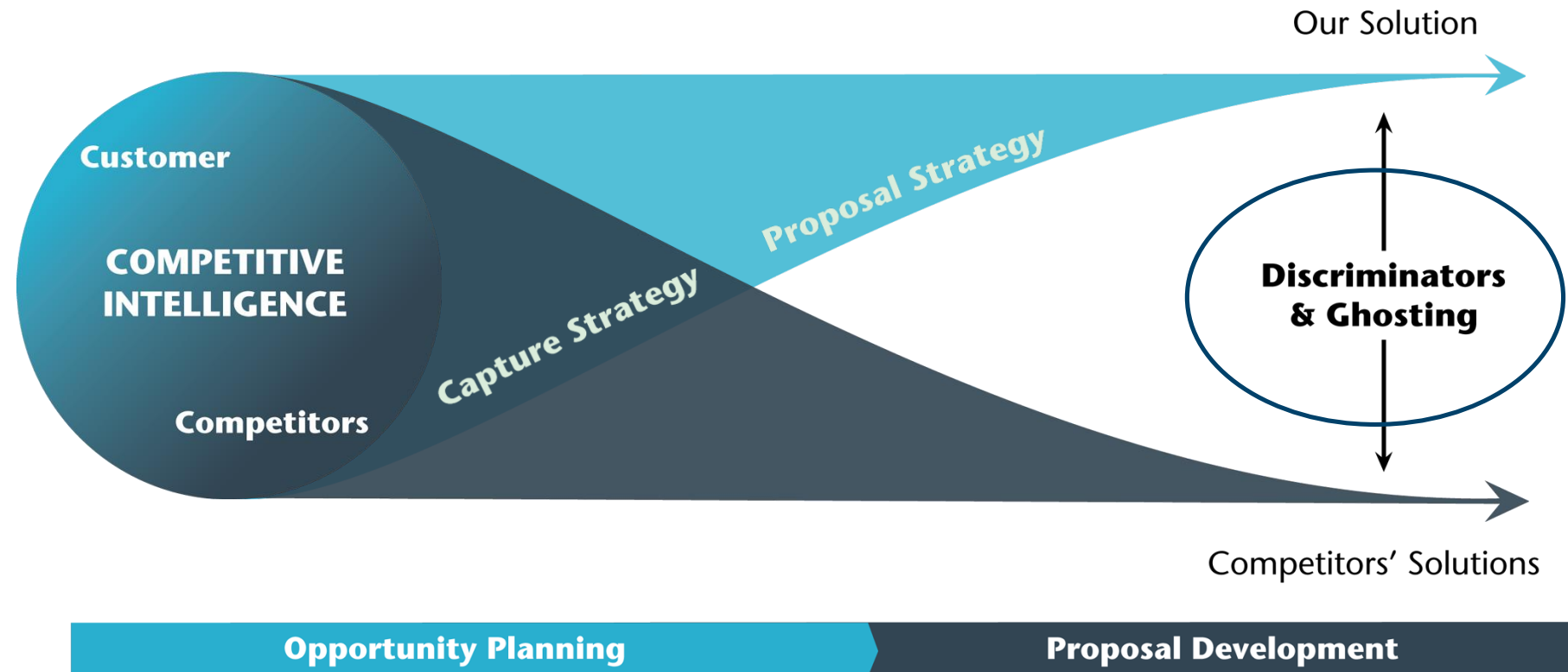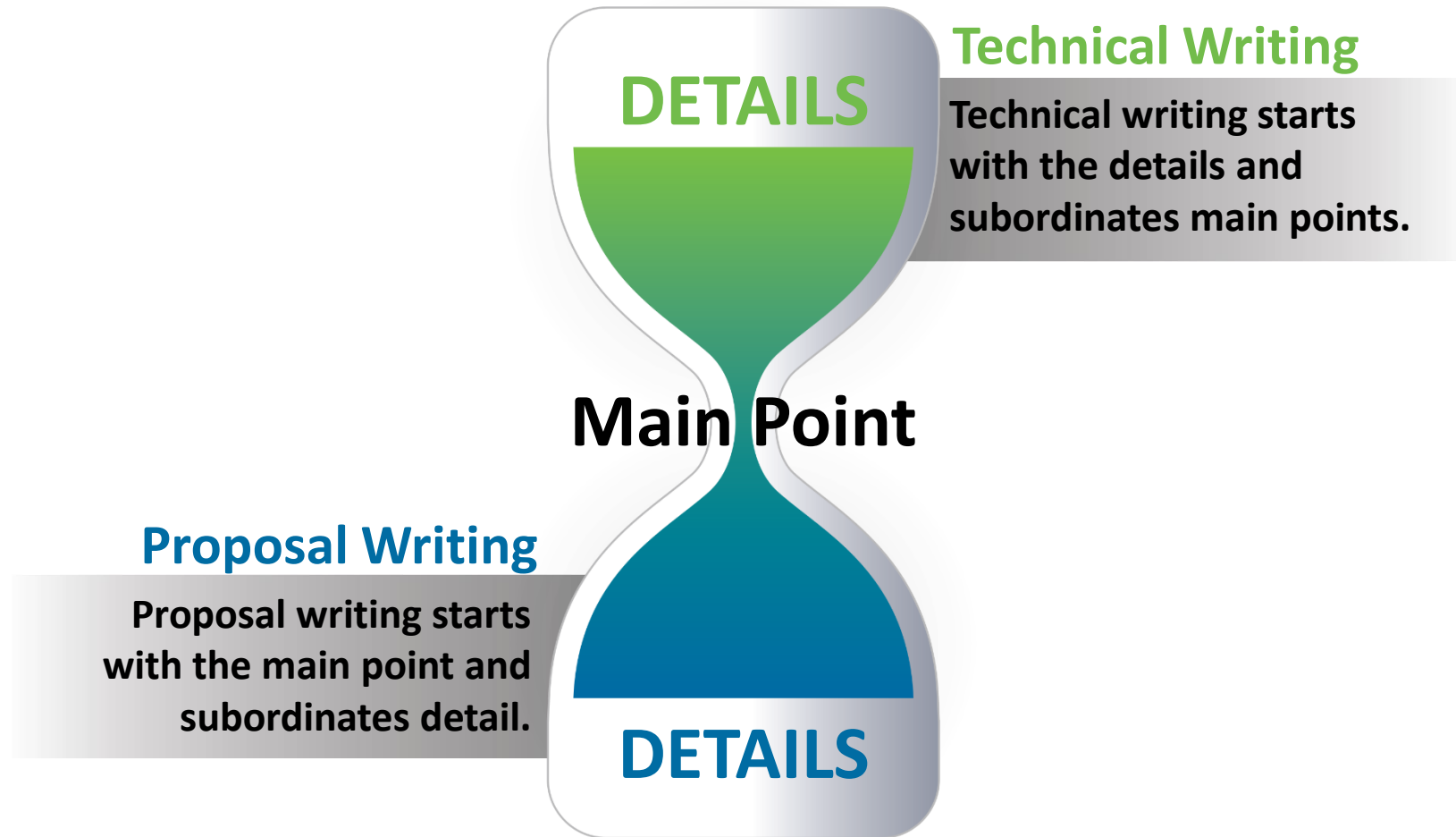
Quality of Writing

The analytical (or inductive) style must be abandoned in favor of a style that is best exemplified by newspaper articles and sales brochures.

This style of top-down (or deductive) writing provides the main points at the beginning and then develops the details and substantiation, followed by a summary. This approach ensures that your key sales messages are read by the evaluation team.

Proposal Writing Differs Conceptually from Scientific Writing

DETAILS

Technical Writing

Technical writing starts with the details and subordinates main points.

Main Point

Proposal Writing

Proposal writing starts with the main point and subordinates detail.

DETAILS

Analysis of Easy-to-Read Text

Versions	1	2	3	4	5
Number of Words	250	185	259	157	138
Number of Paragraphs	1	3	4	1	7
Number of Sentences	6	8	11	6	10
Averages Sentences per Paragraph	6	2.7	2.8	6	1.4
Average Words per Sentence	41.7	23.1	23.5	26.2	13.8
Passive Sentences	66%	37%	27%	50%	0%
Flesch-Kincaid Grade Level	16.1	9.4	11	9.6	6.8

Visualization

High-level readers of proposals, those either making or influencing the selection decision, often only skim proposals, looking at the graphics that stand out, then reading the captions, headings, highlight statements, and the executive summary.

These evaluators must be able to see why you should be selected without reading body text.

Effective graphics leave overall positive impressions and can make it easy for evaluators to find detailed answers to questions. Studies of retention show that after a single reading, evaluators will remember more of what they see in a graphic than what they read in text.

Visuals Improve Retention

Percent of Recall
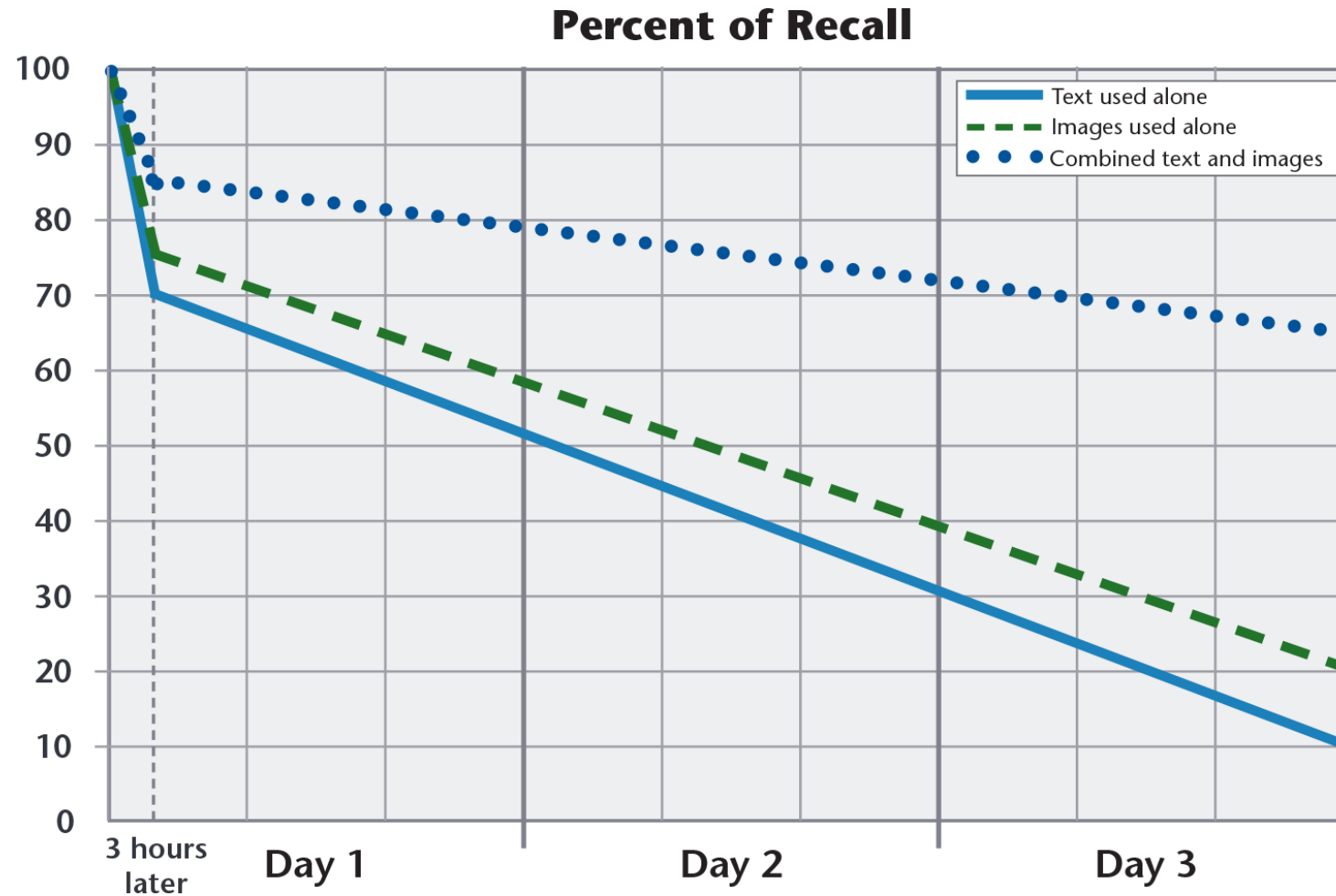
Use Visuals to Enhance Messages

- Emphasize key selling points
- Communicate quickly and obviously
- Keep simple and uncluttered
- Provide action captions
- Make independent of text
- Introduce in prior text
- Position vertically on page
- Minimize foldouts

Use Photographs to Stress Reality

Figure x.x. Easy testing with the TMX 301 Reader. *The handheld leads on the TMX 301 reader allow you to easily test various engine components.*

SAMPLE PHOTOGRAPH

Guidelines for photographs:
- *Use to show reality, evidence, or results*
- *Ensure view angle of photograph aids understanding*
- *Ensure photograph has a central point of interest*
- *Crop to eliminate distractions*
- *Ensure there is sufficient contrast and it is in focus*
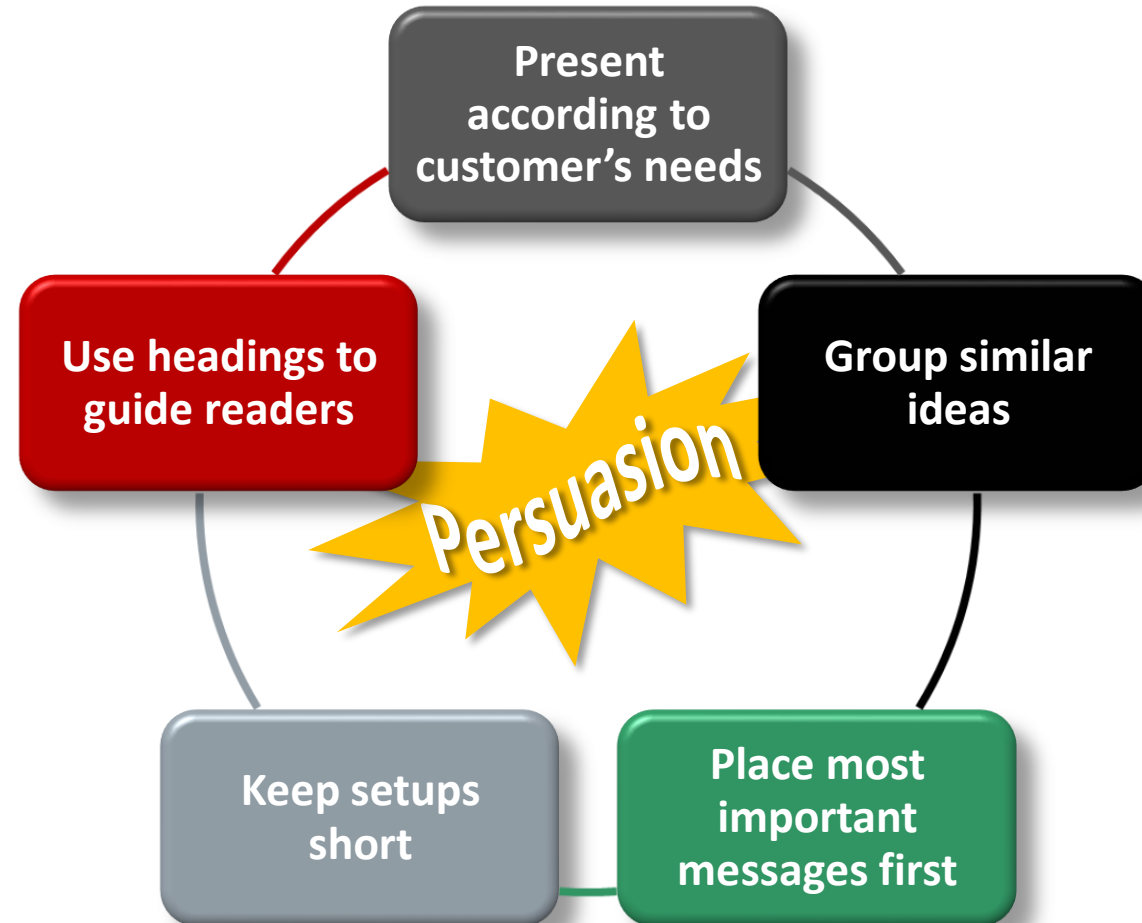- *Include an object that permits size and proportion comparison*
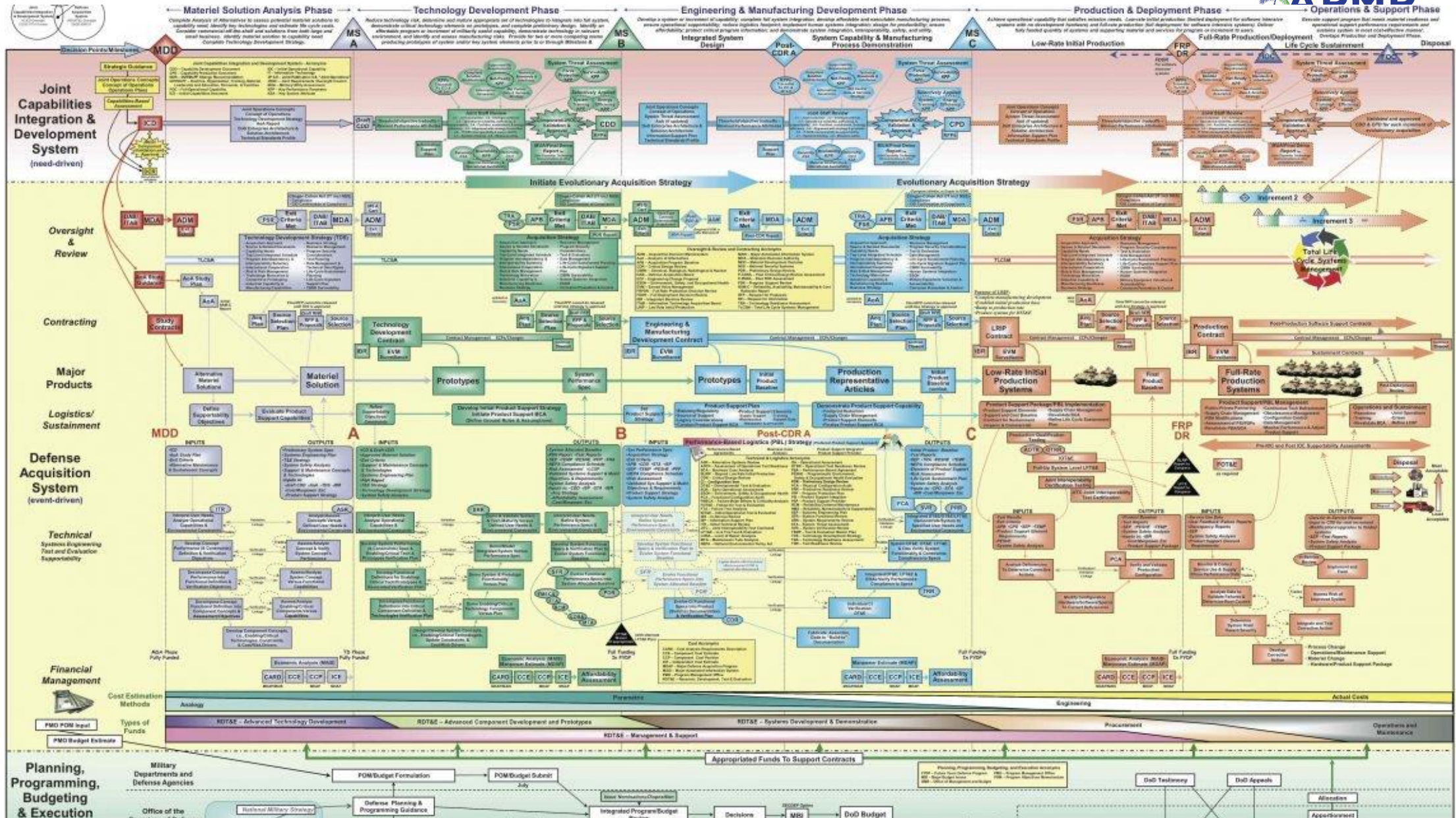
Page and Document Design

People are lookers first, then readers. A good page and document design entices readers, then facilitates understanding, even though evaluators may not be conscious of the design techniques used. A well-organized, visually appealing design helps evaluators find what they need to know rapidly and easily while reflecting your organization's professionalism.

Studies of retention show that after a single reading, evaluators will remember more of what they see in a graphic than what they read in text. In addition, when evaluators both see and read the same point, they retain information longer.

Fundamentals of Persuasive Organization

Present according to customer's needs

Group similar ideas

Place most important messages first

Keep setups short

Use headings to guide readers

Persuasion

Document Design Begins with Page-Column Layout

Single Column

Double Column

Wide Margin

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Use Fonts Effectively

Poor Example

Better Example

EXECUTIVE SUMMARY

Maxair Sports can meet the Army's need for a small-unit, low-level, undetected airborne reconnaissance aircraft with a modified version of its commercial model Drifter DR277, renamed the URA 277.

Maxair has manufactured ultralight aircraft since 1981 and is an acknowledged leader in this industry. We can produce 670 aircraft per month and are prepared financially with capital assets of $17.5 million and a $2.7 million line of credit to increase our production capacity to meet the Army's needs.

TECHNICAL DESCRIPTION

The URA 277 uses the latest in ultralight technology and design. It complies with international conventions for the design of aircraft switches, controls, and instrumentation. The 28-HP Rotax 277 engine provides spirited performance for the experienced pilot as well as forgiving flight characteristics for the beginning flyer.

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And Finally:

Hope is not a strategy.

Norman R. Augustine
Former CEO, Lockheed Martin