

# Coast-to-Coast in Agile Proposal Development

# Introduction

## Anatalia Macik

- CP APMP
- APMP HQ Board of Directors (2021-2022)
- APMP's International 40 Under 40 Class of 2020
- Bid/Proposal Director at Leidos, SD&A
- 17+ years of experience as a writer/editor
- 12+ years in proposal development
- Agile is a mindset and an efficient way to carry out all types of business



# Introduction

## Eric Billingsley

- APMP Foundation-Level certified
- Proposal writer for the Ventura, CA-based information technology company VSolvit, LLC.
- 20+ years of experience as a writer; 3 years of experience in proposal development
- Adopted Agile proposal development methods as part of department-wide change, and believe it has helped improve team communication, morale, and production



# Agenda

- What is Agile?
- West Coast Agile Implementation
- East Coast Agile Implementation
- Benefits and Challenges of Using Agile
- How to Apply Agile
- Conclusion
- Questions and Answers

# What is Agile?

# Waterfall vs. Agile

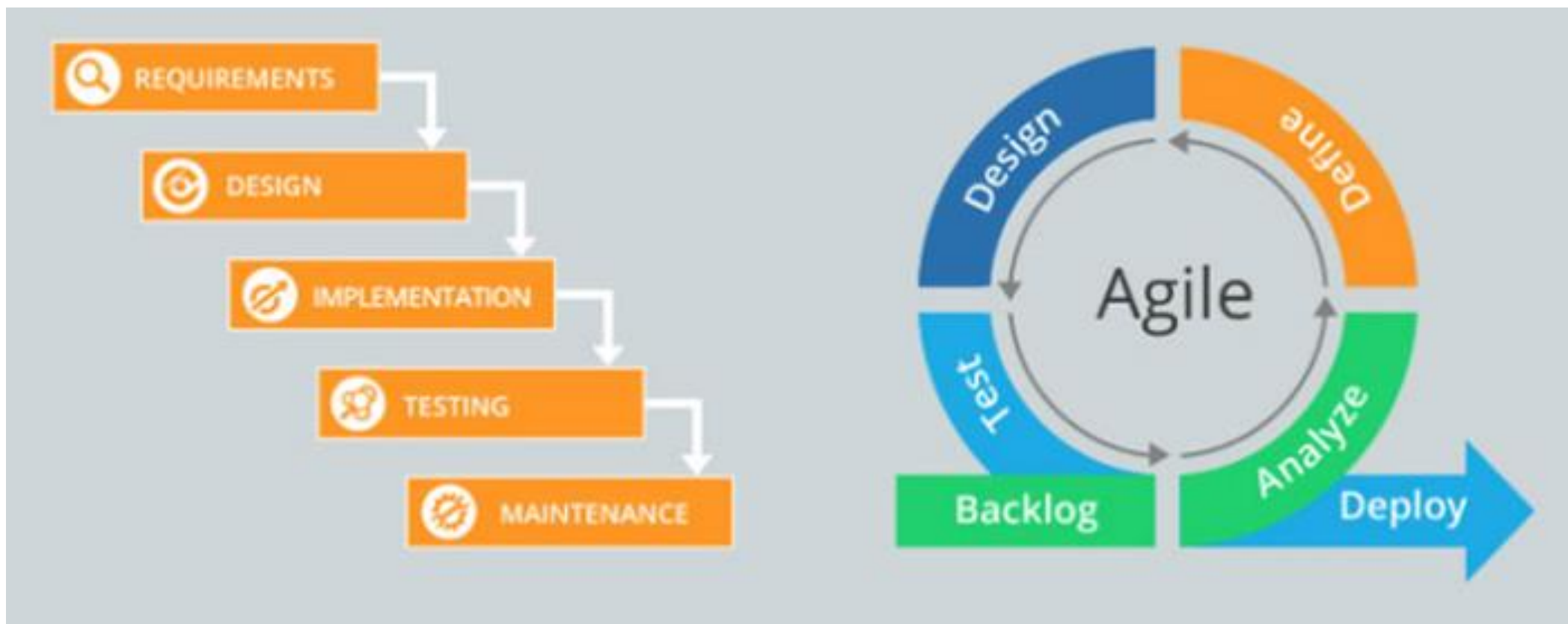


Image Source: yugasa.com

# The Agile Manifesto

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We are uncovering better ways of developing software by doing it and helping others do it.

Through this work we have come to value:

**Individuals and interactions over processes and tools**

**Working software over comprehensive documentation**

**Customer collaboration over contract negotiation**

**Responding to change over following a plan**

That is, while there is value in the items on the right, we value the items on the left more.

# Why Does Agile Apply So Well To Proposal Development?

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- **Individuals and interactions over processes and tools**
  - Leveraging many contributors while working collaboratively
  - Communicating and gaining consensus
- **Working *content* over comprehensive documentation**
  - Developing content in sections
  - Using iterative reviews
- **Customer collaboration over contract negotiation**
  - Understanding our customers and communicating with them
- **Responding to change over following a plan**
  - Creating an adaptive mindset for the entire response team



# West Coast Agile Implementation

# How VSolvit, LLC Applies Agile to Proposal Development

- VSolvit is a Ventura, CA IT services company
- Transitioned to Agile 2+ years ago to improve efficiency
- Also transitioned to improve team communication
- Agile allows the team to work on multiple sections of the proposal simultaneously
- Progress is not dependent on completing other sections
- Daily Scrum meetings assist with communication

# Key Aspects of Agile Proposal Process

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- Four, one-week iterations or “Sprints” on a 30-day proposal schedule
- Daily Scrum meetings (15 minutes or less)
- Content completed on a collaborative platform (e.g., Google Docs)
- Content reviewed as soon as it’s ready in “rolling reviews”
- “Sprint Reviews” conducted at the end of each iteration
- Changes and concerns are addressed as they arise

# Agile Roles and Responsibilities

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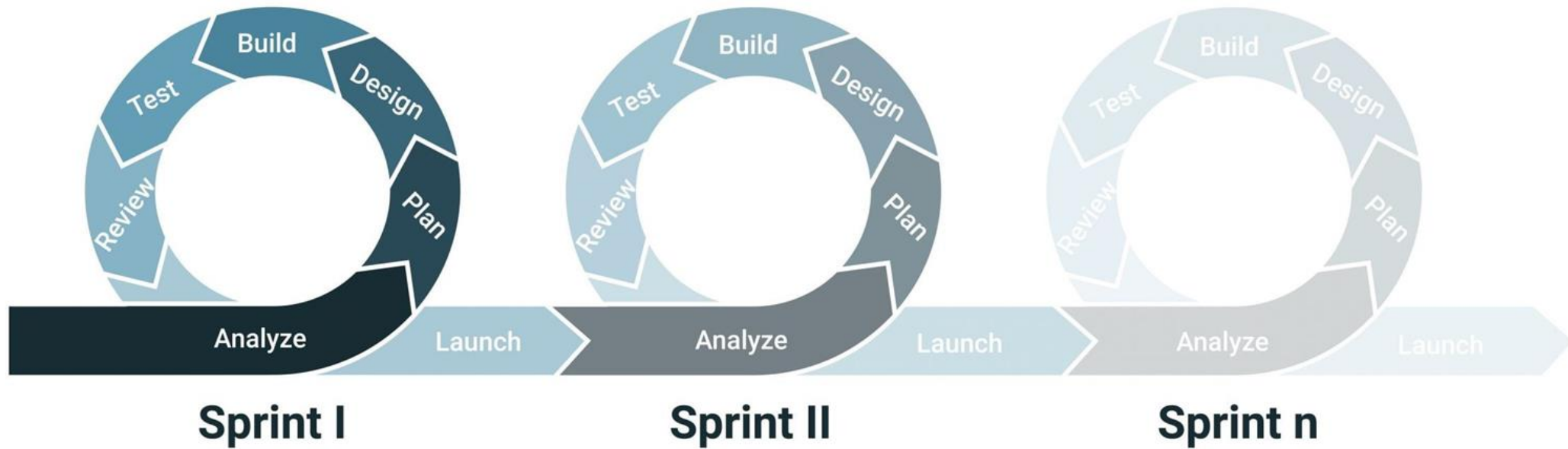
**Product Owner = Capture Manager**

**Scrum Master = Proposal Manager**

**Stakeholders = Executive Leadership**

**Team = SMEs, Writers, Pricing**

# Iteration “Sprint” Cycles



# Pre-Proposal Development Planning

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- Determine proposal strategy
- Develop proposal team
- Plan the proposal development timeline
- Schedule kickoff meeting

# Sprint 1: Storyboarding

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- Executive Summary
- Outlines of volumes are created in alignment with requirements/compliance
- Initial input for volumes added in bullet format
- Incorporate win themes
- Not concerned with grammar or readability
- Rolling reviews of each section (e.g., technical, management, pricing)
- Reviewer comments placed into the Backlog for next Sprint

# Sprint 2: Compliance

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- Bullets are transformed into complete, paragraph-form text
- Reviews are compliance focused: Do we cover everything the customer is asking for?
- Can content be clearly linked to the SOW or PWS?
- Grammar and readability start to become a focus at this point
- Rolling reviews of each section (e.g., technical, management, pricing)
- Reviewer comments placed into the Backlog for next Sprint



# Sprint 3: Compelling

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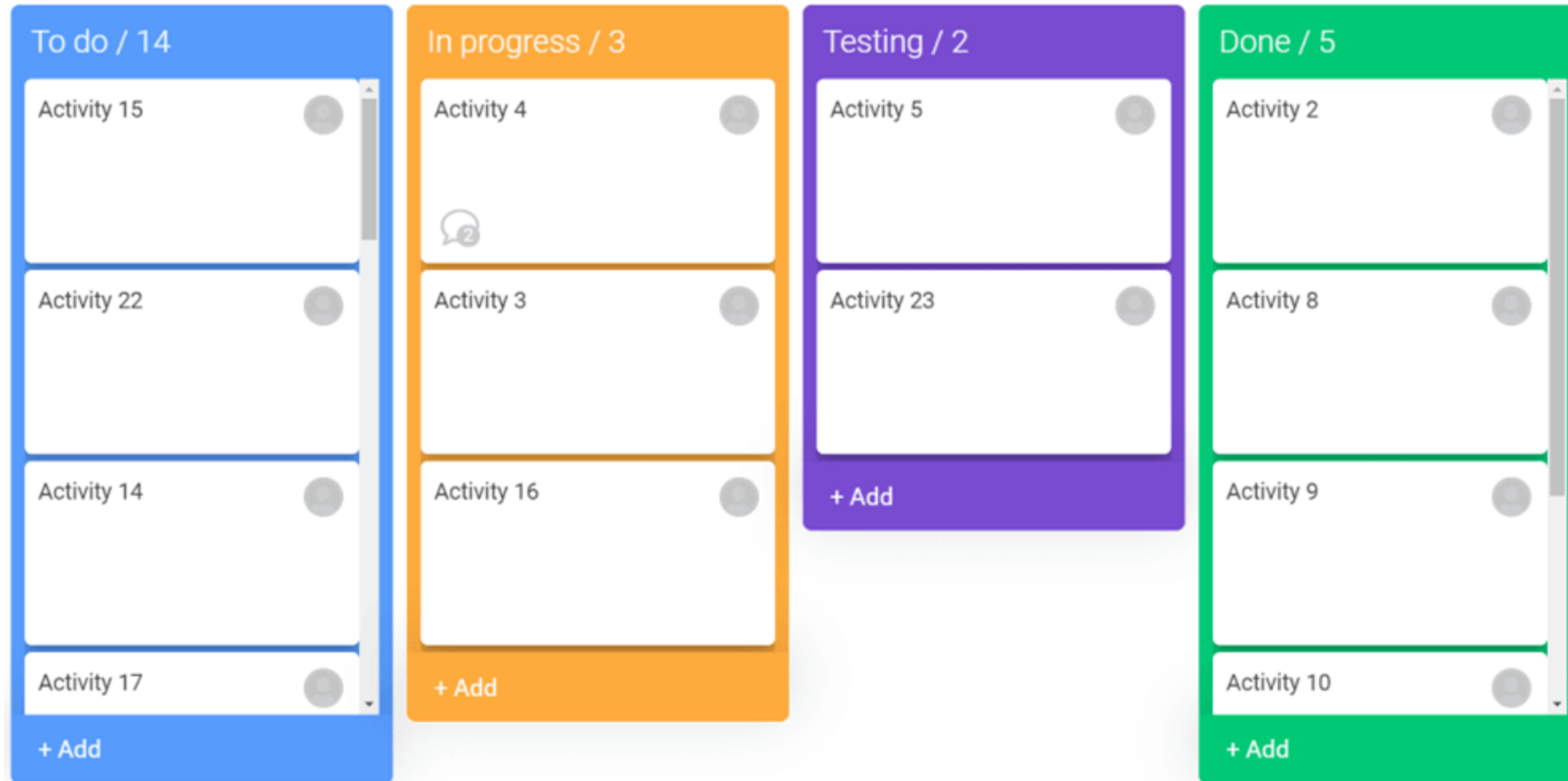
- Volumes should be at or below page count
- Text should be clear, concise, jargon-free, grammatically correct
- Features should be tied to quantifiable metrics, and include the “so what” factor
- Proposal should have a consistent voice
- Compliance is still a concern
- Rolling reviews of each section (e.g., technical, management, pricing)
- Reviewer comments placed into the Backlog for next Sprint

# Sprint 4: Final

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- Volumes are at page count and transferred into the format necessary for submission
- Fix document formatting issues from transfer
- Final grammar and spelling check
- Final compliance review
- There should be no changes to content unless it is compliance related
- Executive sign off and submittal

# Tracking Proposal Development - The Kanban Board



# East Coast Agile Implementation

# How Leidos is Building an Agile Proposal Development Team

- Began in Nov. 2020 with Leidos' SD&A Organization
- Conducted skills and business gap analysis
- Reorganized team structure and reset expectations
- Training, training, training
- Recruited for new skill sets
  - Prioritized cross functional skill sets
  - Looked for complementary personalities
  - Focused on ambitious candidates
  - Ensured transparency during interviews
- Training, training, training

# Challenges

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- 5 months to fill all positions (Jan to May 2020)
- 2 resignations from existing staff, back-to-back; 1 new hire resignation
- Dozens of consultants were used during the 5 months to recruit the team
- Management hours are significant
- Change management is not achieved overnight, patience is a virtue

# Successes

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- Collaborative team where everyone is equal contributor and leader
- Workload balancing is easier, work-life harmony is achievable
- Team members feel more fulfilled and like they're contributing more = retention
- Proposal quality has improved significantly in the last 9 months resulting in high technical rankings
- Communication (internal and to external departments) has improved dramatically

# Future Plans

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## Collect Lessons Learned

Throughout the remainder of 2021, we'll continue to collect feedback and document lessons learned on current processes

## Refine

Using the lessons learned and other feedback, we'll refine our processes and tailor a training plan for our staff and stakeholders

## Training

Beginning in 2022, we'll launch a detailed training plan to get all contributors and stakeholders on the same page

## Execute

Using consistent messaging, we'll continue to execute our processes and provide training, collecting feedback periodically



# Benefits / Challenges of Using Agile for Proposal Development

# Benefits

- Agile is an accepted best practice in many industries
- Promotes a high level of collaboration
- Rolling reviews provide more eyes earlier in the process
- Daily standups keep the team accountable
- Can assist in increasing productivity

# Challenges

- It might be more difficult for a non-IT company to adopt Agile
- Requires Organizational Change approach
- Recommended to use professional Agile trainer
- Long-time proposal veterans and reviewers can be resistant to using Agile

# How to Apply Agile at Your Company

# For the 1- Person Shop

- **Communicate**
  - Benefits
  - Expectations
  - Areas to contribute
- **Plan**
  - Take Agile or Scrum classes
  - Dissect your current processes and typical workload
  - Pick the tools that will increase efficiency
- **Execute**
  - Be patient, trust the planning, and continue to communicate
  - Be consistent
  - Adjust when needed, continuous improvement is the ultimate goal

# Transitioning An Existing Team

- **Analyze**
  - Determine the current skill set
  - Identify other adjacent departments
- **Empower**
  - Ensure each team member leads as equally as they contribute
  - Decentralize management
- **Act Fast**
  - Recognize key contributors immediately
  - Promote personal accountability

# Conclusion

# Thank you!



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