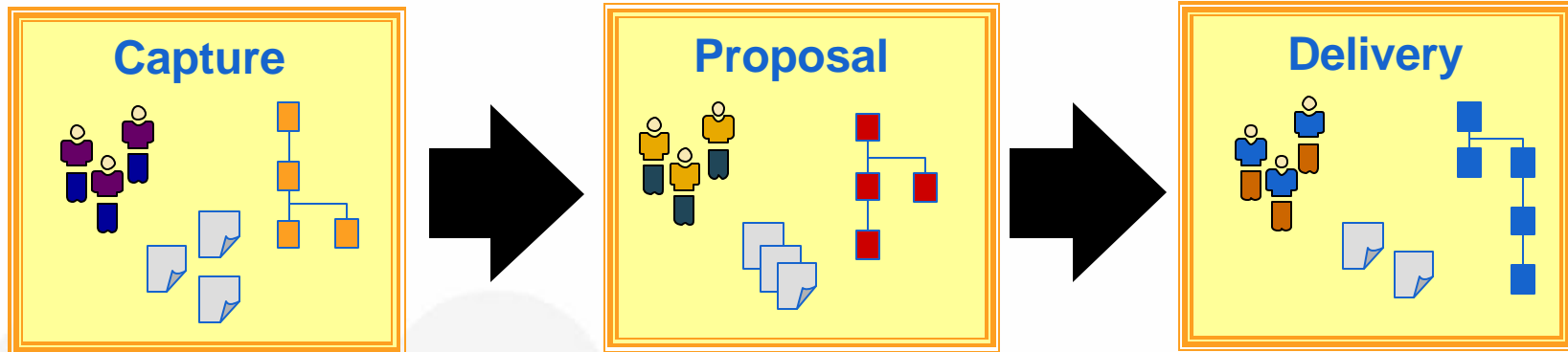# Keys to Developing Winning Proposals Consistently

Ronny Tey
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APMP – SoCal
April 22, 2004

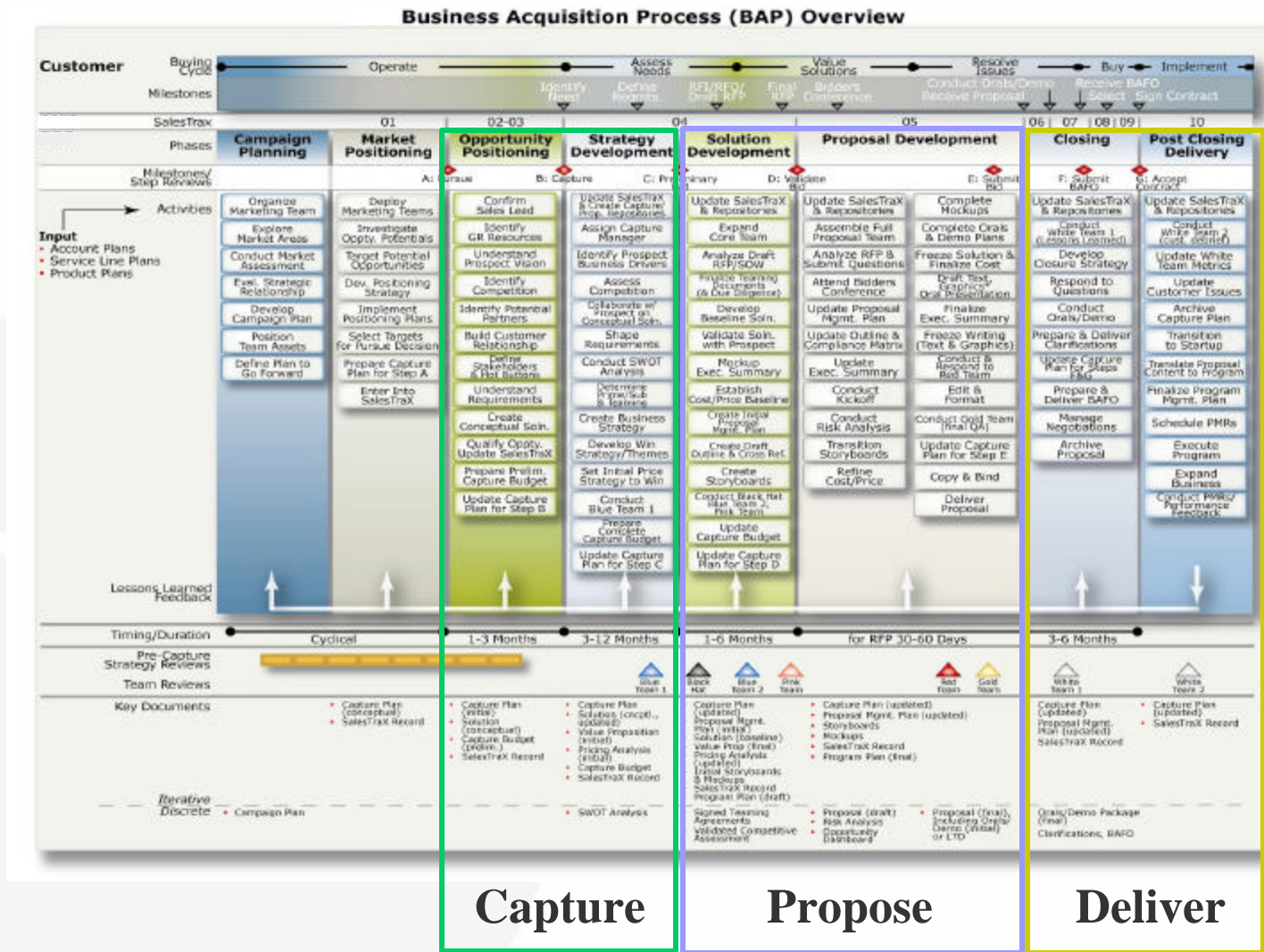# Capture, Proposal, and Delivery Challenges

- Capture
  - Inability to enforce data collection and opportunity qualification process
  - Reduced management visibility into information stored in individual files
- Proposal Development
  - Labor intensive, manual process
- Solution Delivery
  - No unified view of schedules, expectations, commitments, and deliverables

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Challenges in Developing Winning Proposals Consistently

- Tight and rigid deadlines

- Current and accurate information is needed from many individuals across different departments (legal, sales, marketing, operations, engineering, etc) and stored in separate files

- Requires commitment and contribution from many proposal team members who are not full-time proposal professionals

- Managed with desktop tools such as e-mail, MS Project, and spreadsheets and passive collaboration systems

- Management is challenged to instill a repeatable scalable process and gain real time visibility and control

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The Business Acquisition Process

Business Acquisition Process (BAP) Overview

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BD Capability Maturity Model

Key Process Categories	Customer	Focus	People	Capabilities
Themes	Increasing Customer Value	Improving Performance and Synergy	Building Competencies and Teams	Enhancing Systems and Processes
Levels	**Key Process Areas (KPAs)**			
5 Optimizing	✍ Innovation and Transformation			
4 Managed	✍ Relationship Management	✍ Enterprise Influence ✍ Quantitative Process Management	✍ High-Performance Teams	✍ Business Develop Systems Integration ✍ Infrastructure Management
3 Defined	✍ Solution Development	✍ Organizational Tactics ✍ Quality Management	✍ Organizational Competencies Development	✍ Business Development Processes ✍ Support Systems
2 Repeatable	✍ Response Generation	✍ Business Development Administation ✍ Quality Control	✍ Individual Skills Development	✍ Sales/Capture Procedures ✍ Work Environment
1 Initial	✍ Ad Hoc			

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BD-CMM Level Definitions

Level	Characteristics
5 – Optimizing	Continuous business development process improvement is enabled by quantitative feedback from the process and from **piloting innovative ideas and technology**.
4 – Managed	Detailed measures of the business development process and results are collected. Both the **process and products are quantitatively understood and controlled**.
3 – Defined	Process for business development activities is **documented, standardized, and integrated into the organization**. All activities follow an approved, tailored version of the organization's standard process.
2 - Repeatable	Basic business development management processes are established to track cost, schedule, and functionality. The necessary process **discipline is in place to repeat earlier successes**.
1 - Initial	Process is characterized as **ad hoc and occasionally even chaotic**. Few processes are defined. Success depends on individual effort and heroics.

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Benchmark Study

Process Continuum

Focus: Many Small, Routine Opportunities			Focus: Few Large, Strategic Opportunities	
BD-CMM Level	Numerical Win Rate	Dollar Capture Ratio	Numerical Win Rate	Dollar Capture Ratio
4/5	>40%	>50%	>65%	>80%
3	>30%	>40%	>50%	>65%
2	<20%	<20%	<50%	<50%
1	<10%	<10%	<25%	<25%

Goal: Increase win rate and capture rate

Approach: Automate, repeat, manage best BD practices.

Note: Projections based on data collected during APMP Benchmark Study 2002, prior national benchmark studies, and Shipley Associates, Inc. process consulting experience.

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Keys to Developing Winning Proposals Consistently

? Automation of well-defined proposal development process

? Provides <u>repeatability</u> of best practices to lower costs and improve quality

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Keys to Developing Winning Proposals Consistently

? Automation of well-defined proposal development process

➡ ? Provides <u>repeatability</u> of best practices to lower costs and improve quality

? Real-time process adjustments

➡ ? Automates best practices while meeting <u>real-world business requirements</u>

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Keys to Developing Winning Proposals Consistently

- Automation of well-defined proposal development process

  → Provides <u>repeatability</u> of best practices to lower costs and improve quality

- Real-time process adjustments

  → Automates best practices while meeting <u>real-world business requirements</u>

- Automated delivery of complete work packages

  → Ensures that the most <u>current and accurate information</u> is being used

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Keys to Developing Winning Proposals Consistently

- Automation of well-defined proposal development process

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  ➡ Automates best practices while meeting <u>real-world business requirements</u>

- Automated delivery of complete work packages

  ➡ Ensures that the most <u>current and accurate information</u> is being used

- Virtual war room

  ➡ Creates an <u>accountable work environment</u> when co-location is not possible

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Keys to Developing Winning Proposals Consistently

? Real-time collaboration

? Shortens the process by <u>continuous and active involvement</u> of contributors and reviewers

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Keys to Developing Winning Proposals Consistently

? **Real-time collaboration**

➡ ? Shortens the process by <u>continuous and active involvement</u> of contributors and reviewers

? **Access and version control of documents, e-mails, discussions, and other content**

➡ ? Provides appropriate <u>access of information</u> to the right individuals

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Keys to Developing Winning Proposals Consistently

? Real-time collaboration

? Access and version control of documents, e-mails, discussions, and other content

? RFP compliance tracking

➡ ? Shortens the process by <u>continuous and active involvement</u> of contributors and reviewers

➡ ? Provides appropriate <u>access of information</u> to the right individuals

➡ ? Ensures that proposals <u>address customer requirements</u> and tracks signoffs

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Keys to Developing Winning Proposals Consistently

- Real-time collaboration

  ➡ Shortens the process by <u>continuous and active involvement</u> of contributors and reviewers

- Access and version control of documents, e-mails, discussions, and other content

  ➡ Provides appropriate <u>access of information</u> to the right individuals

- RFP compliance tracking

  ➡ Ensures that proposals <u>address customer requirements</u> and tracks signoffs

- Real-time status and historical reporting

  ➡ Provides <u>visibility and control</u> of proposals and enables continuous process improvements

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Increasing Complexity is Reality

- Rapid pace of consolidation

- Increased reliance on outsourcing

- Increased partnerships to offer complete solution or extend the sales channel

- Government initiative for more collaboration through e-government and outsourcing
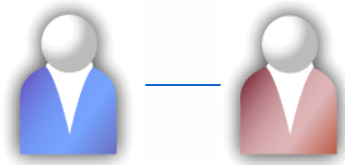
51.7% of projects today are considered complex or highly complex

* Based on a survey of more than 1000 project professionals by the Center for Business Practices (2003)
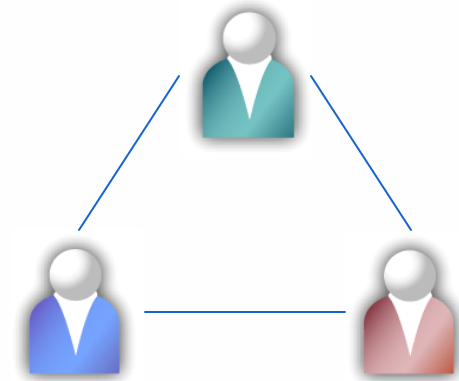
Capture · Propose · Deliver
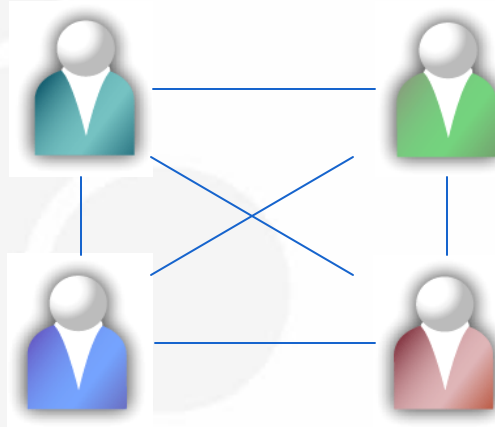
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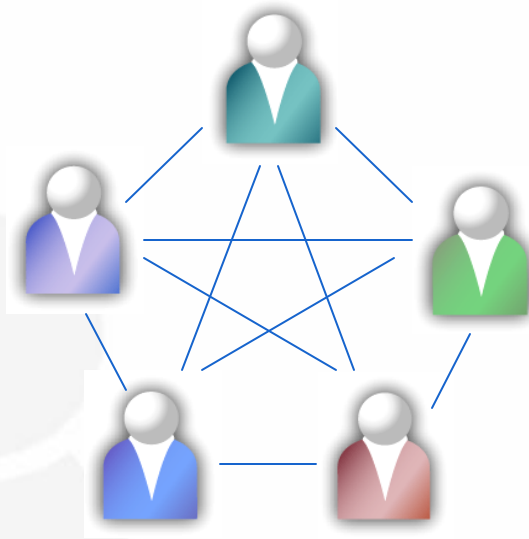# Managing Complexity

2 Partners, 1 Channel

3 Partners, 3 Channels

4 Partners, 6 Channels

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Managing Complexity

5 Partners, 10 Channels

$$N = \frac{n \times (n-1)}{2}$$

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Managing Complexity

Manufacturing

Engineering

- *Process*
- *Schedules*
- *Documents*
- *Data*
- *Emails*
  …..

Legal

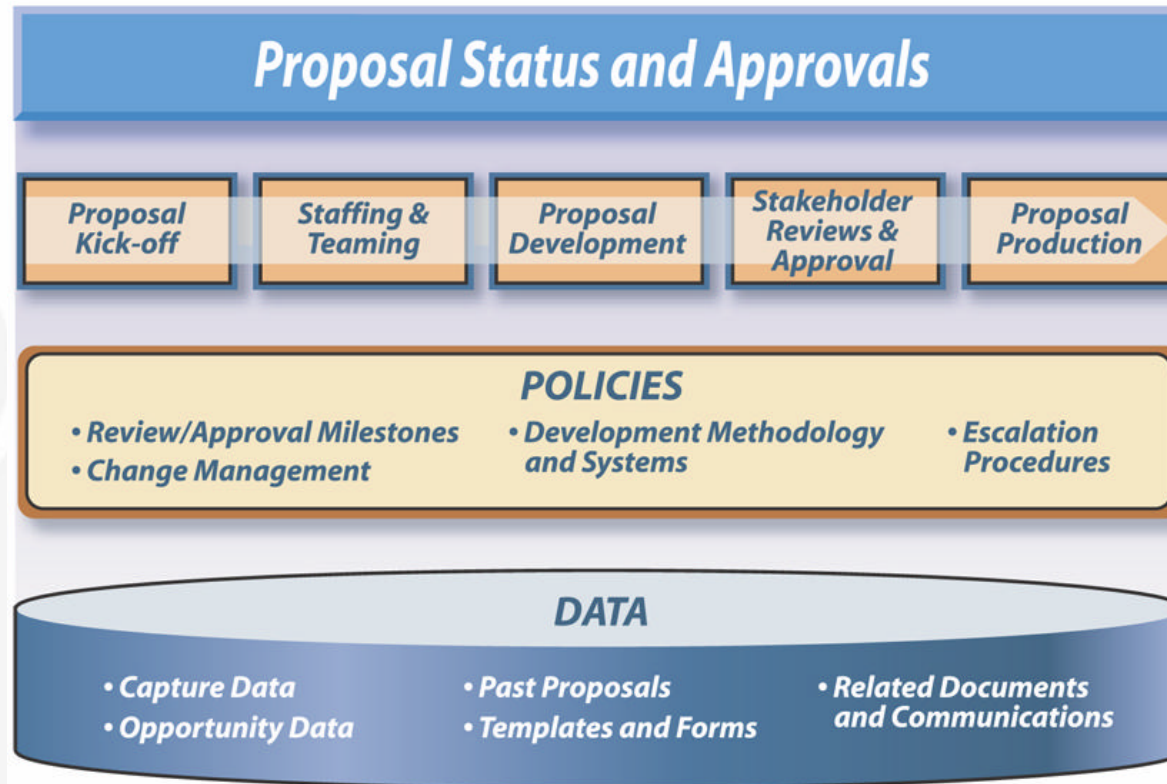Marketing

Subcontractor

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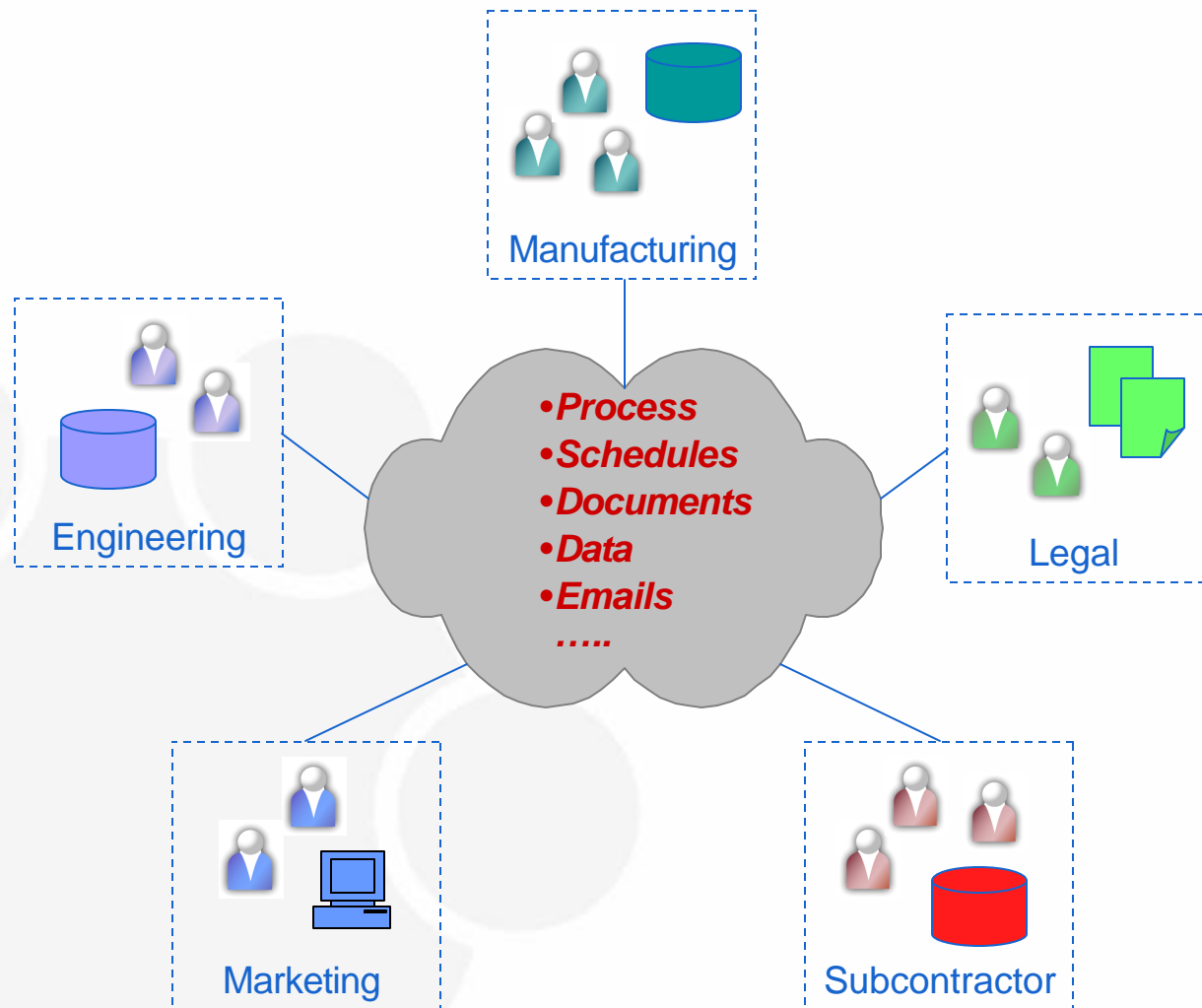
Integrate Process, People, and Information
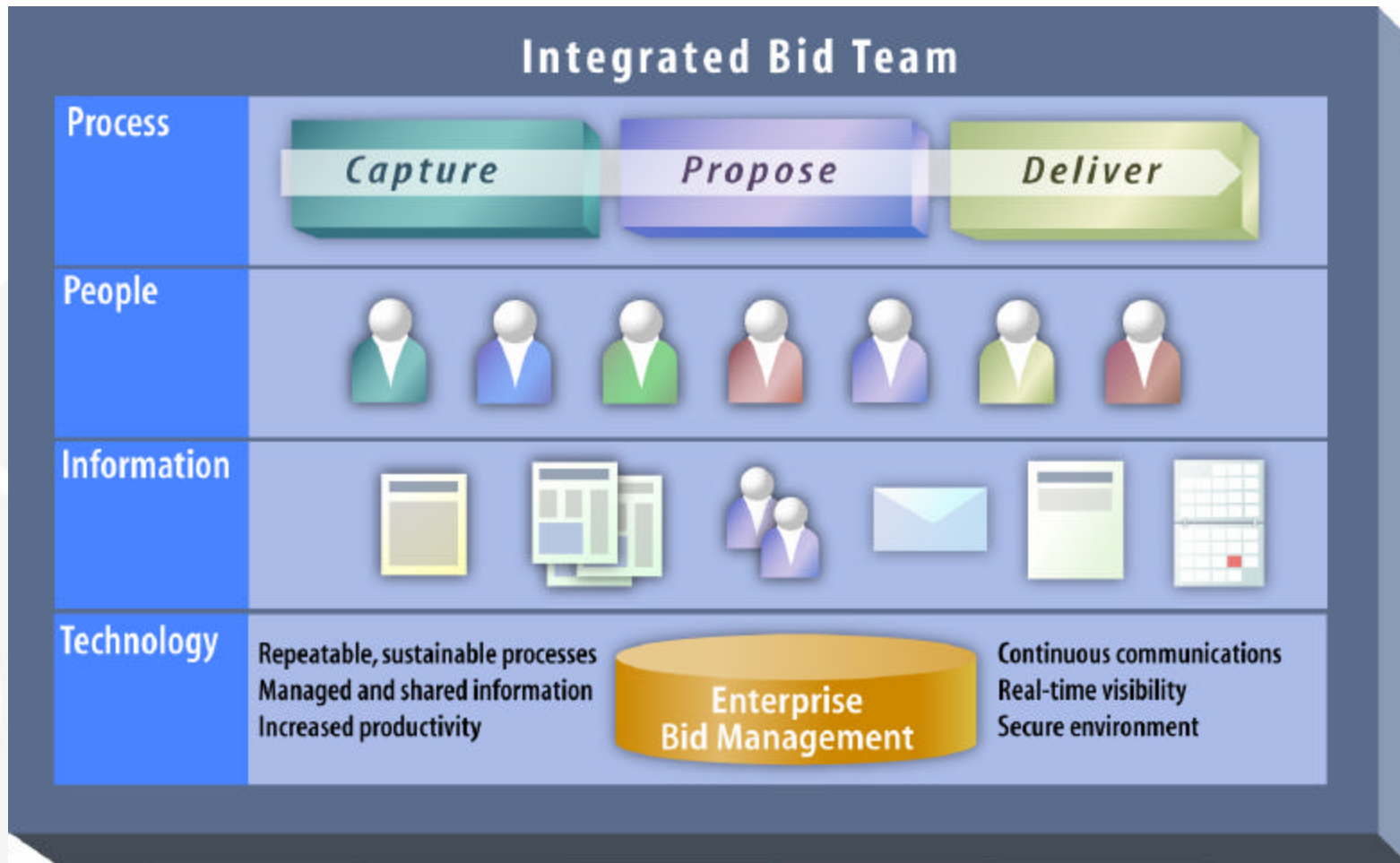
Enterprise Bid Management System
Increase Proposal Throughput and Quality

Enterprise Bid Management System
Manage Risks with Real-time Information

- Configurable and customized Web-based reports

- Real-time visibility to opportunities, proposals, and delivery efforts

- Early notification of risks and bottlenecks

Business Results

- Higher quality proposals consistently
  - *Continuous and active review cycles*
  - *Focus on RFP compliance and proposal content*
- Increased proposal throughput without increasing staff
  - *Automate administrative tasks*
- Reduction in costs due to rework
  - *Use the most current information, guidelines, and templates*
- Managed risk
  - *Track progress in real-time*
  - *Catch bottlenecks early through proactive alerts*

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For More Information…

Winning and Delivering Profitable Business

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